DOCUMENT RESUME

ED 198 316 CE 027 992

TITLE Secretarial Science. Curriculum Guides for Two-Year Postsecondary Programs. Volume I.
INSTITUTION North Carolina State Dept. of Community Colleges, Raleigh.
PUB DATE 79
NOTE 303p.: Not available in paper copy due to small and light print. For related documents see CE 027 988-994.

EDRS PRICE MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS *Business Education: Community Colleges: *Competency Based Education: Course Descriptions: *Curriculum Development: Curriculum Guides: Educational Media: Instructional Materials: *Job Analysis: Minimum Competencies: Office Machines: *Office Occupations Education: Offices (Facilities): Postsecondary Education: Program Development: *Secretaries: Two Year Colleges
IDENTIFIERS North Carolina

ABSTRACT

The first of three volumes in a postsecondary secretarial science curriculum, this manual provides a systematic approach to analyzing the tasks performed by office workers in designing and developing secretarial science programs. Following an introductory chapter that describes the organization of the manual, chapter 2 outlines the competency-based curriculum development project of which the manual is a part. In chapter 3, the North Carolina secondary business and office education program is described. Chapter 4 presents a discussion of curriculum advisory committees and student organizations. Recommendations for qualified faculty and staff and professional organizations are discussed in chapter 5. Suggestions for facilities, equipment, and instructional aids needed to implement a particular secretarial science program are presented in the sixth chapter. In the final chapter, secretarial and general office curricula are described and office and business education competencies are listed. Appended material includes task surveys and results, equipment lists, curriculum models, and the New Office and Business Education Learnings System (NOBELS) competencies. (Volume 2 and 3, containing the course syllabi and abstract, are also available.) (LRA)

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ED198316

Volume I

SECRETARIAL SCIENCE

Curriculum Guides

For

Two-Year Postsecondary Programs

Winter, 1979

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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Raleigh, North Carolina

FOREWORD

Secretarial science instructors have always strived to provide students with competencies for employment. However, competencies may have been determined based on what the instructor thought students should know rather than on validated job requirements. Curriculums are often designed around available resource materials, informal community surveys and informal follow-up studies. This curriculum manual provides a systematic approach to analyzing the tasks performed by office workers in designing and developing secretarial science programs.

Preparing students for the modern office will require their mastery of the skills, knowledges and procedures of the basic components of beginning to intermediate level office work. Evaluation of student achievement should be relevant to the criteria given for the components. Curriculum organization should meet two criteria - learning and use.

With the institutions' primary concern being student learning, the content should be sequenced to assure that learning is taking place and that this learning will take the shortest amount of time at the lowest possible cost to the student and institutions. In addition, the content should be organized to be as practical and useful as possible to the student in meeting the economic demands of life in earning a living.

Competency-based instruction features modularity, flexibility and performance objectives which will provide for improved curriculum monitoring and evaluation over what is available today. Community college/technical institute goals have always been to develop vocational competency. The competency-based instruction system will provide added assurance that students and the community will get a better return on their investment of time and money in office education.

Roger G. Worthington, Director
Program Development Division
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ACKNOWLEDGEMENTS

Many individuals have contributed to the completion of this publication. Their assistance and cooperation are appreciated.

Appreciation is especially extended to the Secretarial Science Advisory Committee and Curriculum Committee for their full support during the process of exploring business and office career opportunities, determining competencies needed and during the revision of the programs.

Special appreciation and thanks are extended for the assistance in developing and writing the course syllabi given by:

Sue Agee
Bobbie Brown
Freda Bullard
Carol Cartner
Mary Helen Casey
Dr. Jim Cates
Joyce Cherry
Joan Citty
Lou Clark
Ethel Cotton
Edith Dail
Lois Denny
Lyn Durham
Ella Fisher
Carolyn Hawkins
Esther Hodges
Max Hutchins
Dora Johnson
Benjamin Leith
Ralph Rice
Nancy Shook
Lyllis Vuncannon
Jean Woolard
Madge Wray

Acknowledgement is extended to Roger Worthington and June Atkinson for their interest and support in this project and to the community colleges, technical institutes and secondary schools who allowed instructors, department heads and teachers to participate on committees.

Special recognition and thanks are extended to William F. Pugh, Artist Illustrator, for designing the cover for this publication.

A special thank you and appreciation to Ms. Brenda Splawn for her patience and understanding while typing the materials for this manual and providing assistance in decision making and other matters.

Special recognition and thanks are extended to Katharine B. Meadows, Business and Office Education, Department of Public Instruction (Retired, 1977), for her assistance and cooperation in coordinating this project.

Copied materials are used herein; direct quotes are not intended to reflect sex bias on the part of the individuals preparing this manual. This guide has been specifically developed for use in training all students regardless of sex.

THIS WE BELIEVE ABOUT COMPETENCY-BASED EDUCATION

Competency-based education focuses on the mastery concept, which assumes that each student is capable of achieving a stated goal if relevant learning experiences and a flexible time frame are provided. A statement of competency is comprised of a description of the task plus a standard of performance.

Competency-based education is established on the assumption that tasks and standards can be identified and validated. Competencies may be classified as dominantly cognitive, affective or psychomotor. Most exit competencies in business education are either cognitive or affective.

Competency-based education provides a twofold benefit to the business student. First, instructional programs are planned to develop (a) common competencies essential for effective functioning in a dynamic economic and social environment and (b) competencies required for successful job performance. Second, implementation of the systematic approach required by competency-based education focuses on the needs of each student.

<u>About Competency-Based Education, We Believe that</u>:

1. Studies in business education support the thesis that tasks can be identified through research.

2. Identification of tasks performed by business workers and by consumers is the first step in the formulation of competencies. Determination of the standard or range of standards is the second step in order to convert each task to a competency.

3. Continuous research is needed to identify and modify competencies relating to the total business education program.

4. Continuous validation of competencies is essential to verify applicability.

5. Competencies should provide the basis for program articulation, which will facilitate student progress.

<u>About Competency-Based Teacher Education, We Believe that</u>:

1. Preservice and inservice teacher education programs should be based upon identified teaching and technical competencies.

2. A continuous effort is needed to validate existing competencies for teacher education and to formulate additional teaching, technical, personal adjustment and attitudinal competencies.

About Implementation of Competency-Based Education, We Believe that:

1. A continuous-progress program should be considered as a viable alternative to the administrative units such as semester and year.

2. Program development should employ the systems approach, the general scheme of which includes: (a) using identified tasks as the basis for competencies on which to build goals; (b) constructing appropriate process and product criterion-referenced measures to determine the attainment of goals; (c) pretesting to identify the learner's initial performance in relation to a given goal and to prescribe successive actions; (d) offering a variety of instructional resources to enhance student learning; (e) posttesting to determine student achievement; and (f) using feedback emerging from the evaluation to reroute students and to evaluate the effectiveness of the system.

3. Inputs into the system include (a) the identified competencies, (b) the student (with multiple individual characteristics); (c) the teacher (with multiple individual characteristics, and (d) the instructional resources requiring multiple student interactions - reading, writing, listening, speaking, discussing, observing and performing.

4. Identified competencies should be scrutinized to determine (a) whether each is sufficiently important to become part of an instructional program, (b) whether each is to be a primary or secondary goal; and (c) whether in-school instruction is the most appropriate delivery system.

5. Concentrated attention should be given to include affective competencies which focus on the development of characteristics essential to successful interpersonal relations and to a positive self-image.

6. Learners should be provided opportunities to structure some individual goals which are mutually agreed upon.

7. The systems approach should be expanded to encourage students to analyze and modify attitudes; to formulate and redefine values; and to make decisions.

8. Ongoing efforts should be made to develop, test, modify and validate criterion-references measures.

9. Continuous efforts should be made within teacher education - preservice and inservice - to enable the classroom teacher to plan and implement competency-based programs.

A Statement by the Policies Commission for Business and Economic Education.

TABLE OF CONTENTS

	Page
FOREWORD	ii
ACKNOWLEDGEMENTS	iii
THIS WE BELIEVE ABOUT COMPETENCY-BASED EDUCATION	v
*Chapter	
I. INTRODUCTION	1
Secretarial Curriculum Development in the North Carolina Community College System	1
SECRETARIAL SCIENCE CURRICULUM ADVISORY COMMITTEE	1
Committee Objectives	1
Committee Report and Recommendations	1
DEFINITION OF TERMS	2
ORGANIZATION OF MANUAL	4
II. COMPETENCY-BASED CURRICULUM DEVELOPMENT PROJECT	1
INTRODUCTION	1
RATIONALE OF THE PROJECT	2
PURPOSE OF PROJECT	3
STAGES OF PROJECT	4
Initiation Stage	4
Method and Procedural Stage	7
Evaluation Stage	8
ORGANIZATION OF PROJECT COMMITTEES	10
NOBELS CURRICULUM PROJECT	11
CAREER OPPORTUNITY SURVEY	11
Selection of Subjects	11

*Each chapter will begin with page one. Each page will be identified with an Arabic number in lower center and chapter number in lower right-hand corner.

Chapter		Page
	Design of Survey	12
	Results of the Survey	12
	CAREER OPPORTUNITIES IDENTIFIED	13
	MACHINE OPERATORS	13
	Computation	13
	Processing Data	13
	Reprographics	15
	TYPISTS	15
	CLERK	16
	SECRETARY	18
	EMPLOYMENT PROJECTIONS	20
III.	SECONDARY BUSINESS AND OFFICE EDUCATION PROGRAMS IN NORTH CAROLINA	1
	PROGRAM DESCRIPTION	1
	MAJOR PROGRAM OBJECTIVES	1
	SCOPE AND SEQUENCE OF BUSINESS AND OFFICE EDUCATION	1
	BUSINESS AND OFFICE EDUCATION COURSES	5
	OUTPUT STANDARDS	5
	TEXTBOOKS	5
IV.	CURRICULUM ADVISORY COMMITTEES AND STUDENT ORGANIZATIONS	1
	ADVISORY COMMITTEES	1
	STUDENT LEADERSHIP ORGANIZATIONS	2
	FUTURE BUSINESS LEADERS OF AMERICA - PHI BETA LAMBDA, INC.	2
	FUTURE SECRETARIES ASSOCIATION	3
	OFFICE EDUCATION ASSOCIATION	3

Chapter		Page
V.	FACULTY AND STAFF SELECTION	1
	EDUCATIONAL QUALIFICATIONS	1
	SECRETARIAL AND OFFICE QUALIFICATIONS	1
	FACULTY WORK LOADS	2
	PROFESSIONAL ASSOCIATIONS	2
	Honorary Societies	3
	SUMMARY	3
VI.	FACILITIES, EQUIPMENT AND INSTRUCTIONAL AIDS	1
	FACILITIES	1
	EQUIPMENT	1
	TEXTBOOKS, REFERENCES AND VISUAL AIDS	1
	THE LIBRARY	2
	PROFESSIONAL BOARDS AND ASSOCIATIONS	2
VII.	SECRETARIAL AND GENERAL OFFICE CURRICULUMS	1
	ORGANIZATION OF CHAPTER	1
	INTRODUCTION	1
	CURRICULUM DESIGN	2
	CURRICULUM STANDARDS	5
	Secretarial - Engineering and Technical	5
	Secretarial - Executive	7
	Secretarial - Legal	9
	Secretarial - Medical	11
	General Office Technology	13
	COMPETENCY-BASED MODEL	15
	TASK ANALYSIS	15

Chapter | Page

PROBLEMS OF OFFICE WORKERS 16

COMPETENCIES NEEDED BY OFFICE WORKERS 17

TECHNICAL COMPETENCIES - NOBELS LISTING AND ANALYSIS 19

TECHNICAL COMPETENCIES BY SUBJECT AREA 43

RELATED COMPETENCIES 49

GENERAL EDUCATION COMPETENCIES 61

BIBLIOGRAPHY 1

APPENDIXES

A. Secretarial Science Curriculum and Advisory Committees 1

B. Survey Instrument and Results 5

C. NOBELS Task Surveys and Results 25

D. Equipment Lists 127

E. Curriculum Models 141

F. NOBELS Competencies 165

G. Office Personnel Survey 175

LIST OF TABLES

Table — Page

Chapter II

1. Office Occupations Identified for North Carolina 14

2. Total Employment in North Carolina by Clerical Occupations - 1974, 1977, 1978 and Projections to 1985 21

LIST OF CHARTS

Chart — Page

Chapter II

1. Activity Network/Single Curriculum 5

2. Time Schedule for Single Curriculum 6

Chapter VII

1. Curriculum Design 3

CHAPTER I

INTRODUCTION

Secretarial Curriculum Development in the North Carolina Community College System

Prior to the 1963 Vocational Education Act, a one-year Engineering and Technical Secretarial program was the only type of office education program in the community college system. The 1963 Act provided funds for occupational programs. During Summer, 1964, the State Board of Education approved programs developed by the Department of Community Colleges:

Engineering and Technical - Secretarial
Executive - Secretarial
Legal - Secretarial
Medical - Secretarial

In Fall, 1964, these programs were implemented as two-year associate degree programs by way of the institutions.

Major revisions were made during 1966-67 to the existing programs and General Office Technology was developed to compensate for students interested in general office and clerical occupations rather than secretarial occupations.

SECRETARIAL SCIENCE CURRICULUM ADVISORY COMMITTEE

Committee Objectives

The community college/technical institute secretarial programs remained basically the same until August, 1975, with the establishment of a Secretarial Science Curriculum Advisory Committee. The purposes of the committee were to evaluate the secretarial science program offered in the community colleges and technical institutes and to consider the following points:

1. What needs to be done to strengthen the quality of the program?
2. Should options be offered in secretarial programs?
3. How many courses/hours make an option?
4. Review and/or develop guidelines for the program.
5. Review and/or revise equipment lists for the program.
6. Review the North Carolina State Plan for Occupational Education and make recommendations for implementing the plan.

Committee Report and Recommendations

During the process of revising/developing the secretarial science program, rap sessions were held with various secretarial and office worker groups. Secretaries and clerical workers within the Department of Community Colleges were asked to complete a survey and to give their opinions on the educational needs for business and office personnel.

Committee members used input from these various secretarial and office worker groups to develop competencies and courses for the secretarial science program. The results of their findings are explained in detail in Chapter VII of this manual.

The committee recommendations include:

1. Development of a secretarial science program to include specialty areas such as executive, legal, medical, general office, etc.

2. Emphasis in specialty areas with the graduate receiving an Associate in Applied Science Degree in Secretarial Science. Executive - Secretarial, Medical - Secretarial, etc.

3. The general office program should be of the same quality as the secretarial program. The main exception in the program is the omission of shorthand skills.

4. All institutions offering a specialty area such as executive, medical, legal, etc. should notify the Department of Community Colleges and the State Board of Education in writing of their reasons for offering the specialty area, the advisory committee utilized and their plans for implementing the program.

5. Options are not necessary in the secretarial science program but emphasis should be placed on specialty areas based on community needs. Two or three courses do not make an option or a specialty area and should be avoided.

DEFINITION OF TERMS

For the purpose of clarifying the meanings of specific terms in this manual, the following words are defined:

Articulation - interrelation of different levels of education for ensuring continuous advancement in learning.

Associate in Applied Science Degree - the award given for the successful completion of a technical education curriculum.

Attitude - mental position, a feeling or an emotion toward a face or state; a predisposition to act in a certain way; a state of readiness that influences a person to act in a given manner.

Certificate - an award for the successful completion of a curriculum of fewer than 64 quarter hour credits in length.

Competency - sufficient judgment, skill and knowledge to perform a particular task.

Competency-Based Education - the educational process that specifies learning goals in measurable terms and requires that the learner achieve observable behavior changes in knowledge, skill and/or attitude to demonstrate competency before proceeding to more complex goals.

Competency-Based Instruction - the sequencing and modularization of curriculum into small, manageable units of instruction. The key concept is the student's ability to perform on each segment of the curriculum.

Curriculum - a course or group of courses organized in a logical sequence to meet occupational educational goals.

Diploma - an award for the successful completion of a course of study 64 to 128 quarter hour credits in length.

Educators - refer to individuals employed in educational institutions and in local, state or federal agencies, both secondary and post-secondary.

Job Analysis - a detailed listing of tasks currently being performed by workers in a clearly, defined, specific job.

Knowledge - the recall of specifics and universals, the recall of methods and processes and the recall of a pattern.

LAP (Learning Activity Package) - a set of teaching-learning materials designed to teach a single concept and structured for individual or group use in a continuous sequence of learning experiences.

Learning Experience - an activity planned by educational institutions whereby the student can practice behavior implied by the objectives.

NOBELS - New Office and Business Education Learnings System represents the development of an inventory of 373 educational specifications in behavioral terms that represent basic tasks performed by 16-24 year old office workers.

Occupational Survey - a procedure using mail questionnaires and/or personal interviews to gain knowledge of a community, educational interests or occupational needs to assist in planning.

Office Occupations - Those clusters of occupations defined under U. S. Office of Education (1969) classifications as 14.00. The clusters consist of the following major groupings: 14.01, Accounting and Computing Occupations; 14.02, Business Data Processing Systems Occupations; 14.03, Filing, Office Machines and General Office Clerical Occupations; 14.04, Information Communication Occupations; 14.06, Personnel, Training and Related Occupations; 14.07, Stenographic, Secretarial and Related Occupations; 14.08, Supervisory and Administrative Management Occupations; 14.09, Typing and Related Occupations; 14.10, Miscellaneous Office Occupations.

Skill - the ability to use one's knowledge effectively and readily in execution or performance - dexterity or coordination in the execution of learned physical or mental tasks.

Syllabus - a curriculum guide which includes overall and specific educational objectives; an arrangement of subject matter; learning experiences to give direction in meeting the stated objectives and texts and references. An illustration of evaluation techniques may be included.

Task - a logically related set of actions required for the completion of a job objective; also a task may be a complete job element.

Task Analysis - a study to determine the steps a worker must know and the key points of knowledge to know in order to perform a given task.

Technical Programs - consist of occupational oriented courses and general education courses that lead to the awarding of an Associate in Applied Science Degree. Technical programs are generally two academic years in length and prepare students for jobs in paraprofessional fields.

Technical Specialty Programs - composed of selected technical courses and only those general education and related courses designed to provide a particular technical skill. The diploma may be awarded to the graduate of a technical specialty curriculum 64 quarter hour credits or more in length. The certificate may be awarded to the graduate of a technical specialty curriculum less than 64 quarter hour credits in length.

Understanding - the power to make experience intelligible by applying concepts and theories; the comprehension of ideas and the ability to use abstractions in particular and concrete situations.

Vocational Programs - systematic groups of courses or sequences of subjects designed to train students for employment in specific occupations. Vocational programs may range from one to seven quarters in length, depending upon the development of skills and job proficiency. Certificates are generally awarded upon completion of the one to three quarter programs, and diplomas are awarded upon the completion of programs four quarters in length or longer.

Vocational Specialty Programs - composed of only those subjects necessary to support the development of manipulative skills to prepare students for skilled and semi-skilled employment opportunities. Vocational specialty programs are usually less than four quarters in length. A certificate may be awarded to the graduate of a vocational specialty curriculum.

ORGANIZATION OF MANUAL

The Secretarial Science manual consists of three volumes.

Volumes II and III include only the course syllabi and abstracts.

Volume I includes chapter materials and the manual's bibliography and appendixes.

Description of the competency-based curriculum development project including purpose, methods and procedures is presented in Chapter II.

In Chapter III, the North Carolina secondary business and office education program is described.

Chapter IV presents a discussion of curriculum advisory committees and student organizations.

In Chapter V, recommendations for qualified faculty and staff and professional organizations are discussed.

Suggestions for facilities, equipment and instructional aids needed to implement a particular secretarial science program are presented in Chapter VI.

In Chapter VII, secretarial and general office curriculums are described and NOBELS competencies listed, with course syllabi and abstracts presented in Volumes II and III.

Volume I is concluded with a selected, annotated bibliography and appendixes.

CHAPTER II

COMPETENCY-BASED CURRICULUM DEVELOPMENT PROJECT

INTRODUCTION

The primary objective of vocational/technical education programs is to prepare individuals for employment in the occupations for which the programs are designed and developed. *This education should be consistent with the ability, desire and needs of the student and should maintain quality standards that are consistent with employment requirements.*

In order to provide quality education that meets the needs of the students, there is a continuing need to improve the information base available to administrators, curriculum designers and others who are responsible for making decisions about vocational/technical education programs. In addition, there is a need to develop and disseminate products and outputs designed to improve the management of instruction in vocational/technical education. Efforts directed toward meeting these concerns should ultimately have impact upon the relevance and quality of what is taught in preparing students to perform satisfactorily on the job.

In line with the above analysis, the 1975 Annual Report of the *North Carolina Council on Vocational Education* recommended "that the State Board of Education require that all vocational curricula designed to produce job entry skills be based on performance objectives validated by recent job analysis and task analysis and that parallel performance standards be established for completion of secondary and postsecondary programs, and that the State Board of Education immediately consider the most efficient, expedient method for attaining such a goal." Further, the *State Board* has issued a policy encouraging "formal and informal articulation efforts on a continuing basis between the system of elementary and secondary education and the system of technical institutes and community colleges."

These statements support the basic premise of the North Carolina Community College System which requires that each institution develop fully the unique educational needs of its own service area and that it maintain effective articulation with public schools, with four-year colleges and universities and with employers and employees. Since the development of the Community College System, continuous concern and effort have been given to insuring the quality of programs, providing program guidelines, evaluating programs, improving the articulation process and working with students, employers and educators to determine student, business, industry, government and service needs. To maintain the quality of curriculums in the System, the *Program Development Division* is responsible for assisting institutions and providing support services in the areas of curriculum planning and development, inservice activities and information dissemination.

Recently questions have been raised concerning:

1. The quality of particular curriculums in certain programs.

2. The participation of employers, employees and educators in the curriculum development process.

3. The relevance of today's curriculums to current and future job technology requirements.

4. The increasing cost, as a result of duplication by secondary and postsecondary programs, of developing curriculums and resulting articulation problems.

These problems affect the entire North Carolina System of Community Colleges which extends services to approximately 215,000 students and offers 132 technical and 82 vocational programs in 57 institutions. These students are not considered typically traditional students.

RATIONALE OF THE PROJECT

In response to the questions that have been raised, the six staff persons in the Program Development Division in conjunction with the Department of Public Instruction, representatives from secondary and postsecondary institutions, employers and employees began reviewing the curriculums to determine a plan of action. The decision was made to use the competency-based approach for curriculum design.

This approach will provide a tool for planning, development, implementation and follow-up that should result in a more valid and reliable curriculum. In other words, competency-based programs will bring a clearer understanding of educational intent. By using the competency-based approach, instructors can implement programs having objectives that correlate with the real world of work. *Instructors* can be sure they are teaching the correct, logically-ordered, subject-matter content which will allow more time for them to concentrate on the how rather than the what or when to teach. This is important in our system, as well as in others, because vocational/technical instructors are not always well-trained in educational concepts.

Research has determined that individuals do not learn alike: the same method of instruction does not work the same for all individuals. Therefore, with this approach, instructors will have time to determine how to make instruction clear and comprehensive to all students, i.e., convey information to students as individuals. *Students* can be confident that they are developing the necessary competencies for successful entry-level employment and advancement. *Employers* will be receiving graduates who can perform at specified proficiency levels with this level based on job requirements.

In summary, a competency-based curriculum design project will make provision for the following elements which will assure programs of high quality:

1. Articulation between secondary and postsecondary institutions and where appropriate, employers and employees in business, health, agriculture, public service and industry; private schools; appointed or elected local officials and the general public.

2. A caliber of instruction which will make it possible for the student, upon completion of a curriculum or phases within a curriculum, to meet successfully the demands of the job or to continue education in another curriculum or institution.

3. More *realistic* approach for guidance and placement of each student in occupational choice, training and occupational adjustment because this approach provides information on jobs available, prerequisite, educational and job requirements.

4. Advice and support from employers, employees and advisory committees to assure *more* constructive input throughout the *entire process* of curriculum development.

5. A thorough investigation of needs and programs in a community in order to promote efficient utilization of programs, to provide consistency among programs and to provide competent employees for the job market.

6. Revision and reorganization of programs as indicated by findings from occupational surveys; job analyses; task analyses; follow-up studies and changing technological, social and economic conditions.

7. Standards to evaluate individuals and programs.

8. Uniformity of competencies with characteristics which reflect creativity and individualization.

PURPOSE OF PROJECT

Examination of curriculums in the system has caused concern about whether consistent quality education is being offered that will produce employable graduates in the vocational/technical fields. In response to this concern this project for curriculum materials development is proposed to further the following purposes: (1) to describe the desired outcomes of occupational programs, (2) to provide guidance for increased consistency among programs and (3) to provide mechanisms for improved articulation with high school occupational programs. This concern can be alleviated by the implementation of the competency-based approach to curriculum development. This approach will result in:

1. A validated list of career opportunities for which each curriculum provides training and education.

2. Competency-based and performance-measured curriculum guidelines based on job competencies and standards for measuring performances.

3. Multi-entry and multi-exit curriculums that are based on job requirements and provide for upward mobility of the students and more flexible scheduling which increases the accessibility of the programs.

4. Involvement of employers, employees and educators in curriculum development in order to provide guidance for increased consistency among programs.

5. Improved articulation between secondary and postsecondary institutions.

6. An established system for updating curriculums on a regular basis in accordance with current job technology requirements.

STAGES OF PROJECT

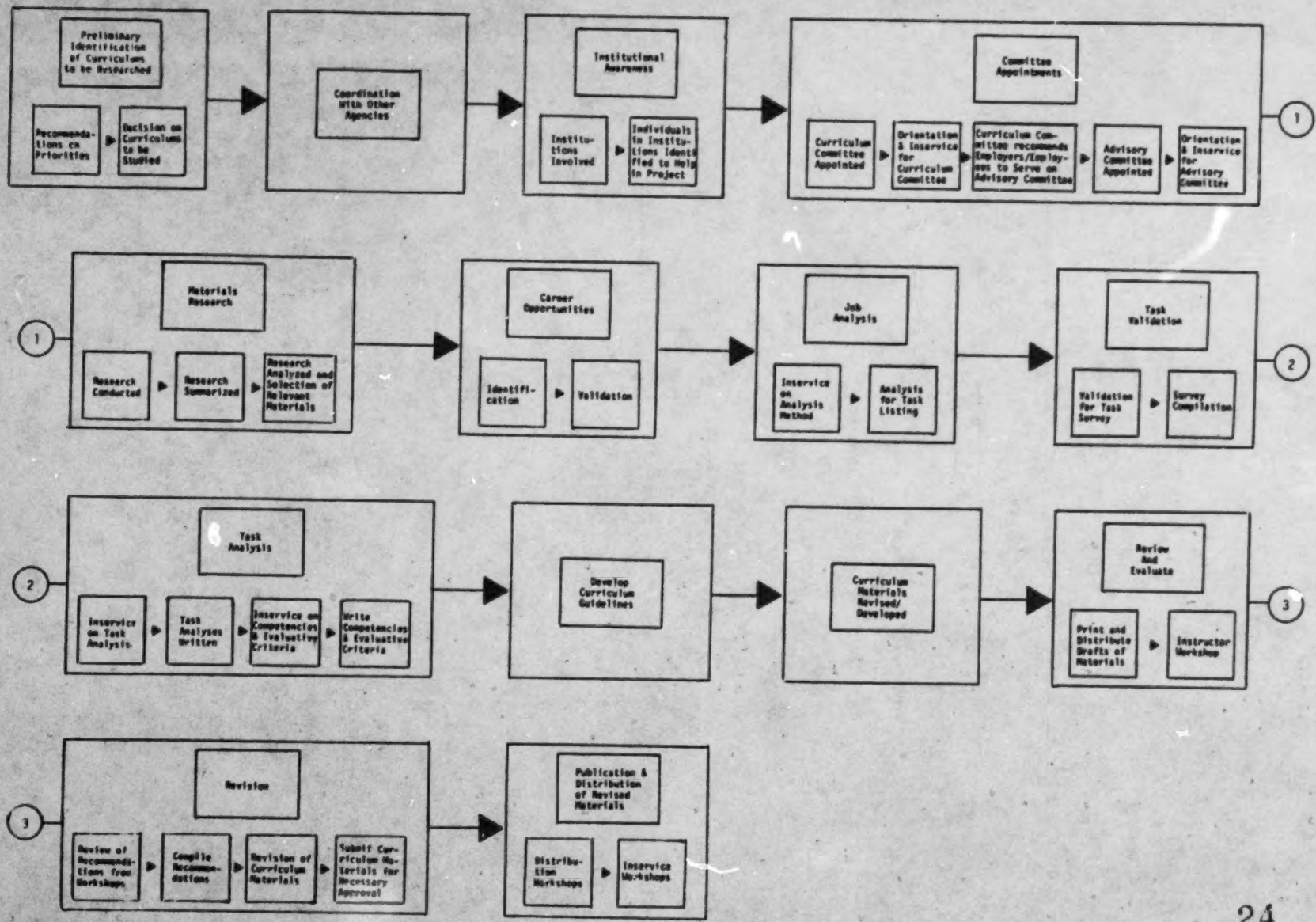
The procedure for the Secretarial Science Competency-Based Project was in three stages. The research study, "Development of Task Performance Statements for a New Office and Business Education Learnings System" (NOBELS) by Frank W. Lanham and others followed basically the same format and phases as described in Program Development's proposal. Therefore, this research was considered valid as a base for conducting the secretarial science competency-based project for North Carolina's community colleges/ technical institutes. (Refer to Activity Network on page 5 and Time Schedule on page 6.)

Initiation Stage

Business and office education curriculums having similar offerings in both secondary and postsecondary institutions were identified. Secretarial and general office curriculums were selected because of the similar curriculums offered in the secondary schools.

Educational institutions within the North Carolina Community College System, other state and related agencies, secondary institutions and postsecondary institutions outside the system were notified of the secretarial science project and invited to participate. They were asked to identify individuals within their institutions and agencies to serve as committee members.

ACTIVITY NETWORK/SINGLE CURRICULUM



TIME SCHEDULE

FOR SINGLE CURRICULUM-

Step	Time In Months	Total Frame Time
Initiation Stage:		3
Survey of Curriculum	1	
Coordination with other Agencies	1	
Institutional Awareness	1	
Method and Procedural Stage:		13
Phase I Committee Appointments	1	
Phase II Materials Research	1	
Phase III Career Opportunities Identified	1	
Phase IV Job Analysis	2	
Phase V Task Validations	1	
Phase VI Task Analysis	3	
Phase VII Curriculum Guidelines	1	
Phase VIII Curriculum Materials Preparation	3	
Evaluation Stage:		10-15
Review and Evaluate	6	
Revision	1-3	
Publication and Distribution	3-6	

Method and Procedural Stage

The method and procedural stage for secretarial science consisted of eight phases:

Phase I

Curriculum committee appointed based on information received from institutions.

Advisory committee appointed based on recommendations of curriculum committee.

Phase II

Intensive research for and review of existing competency-based curriculum materials and programs, in business and office education. Existing competency-based curriculum materials were used as resources, i.e., NOBELS.

Phase III

A survey of resources to determine the career opportunities available in office occupations (secretarial and general office) and validation of these careers.

The career opportunities were identified primarily from the Dictionary of Occupational Titles and by employers and verified through a career survey of employers in business, industry, government and service areas.

Phase IV

An analysis of career opportunities to determine the tasks for accomplishing a job through job analysis and task surveys.

A job analysis was made by the curriculum committee to determine the tasks necessary to function in an office occupation. The tasks were validated by surveying employers, employees and educators.

Phase V

A compilation of surveys by the Secretarial Science Curriculum Committee to revise and prepare a complete list of tasks for each job.

Phase VI

An analysis of each task to determine the knowledge, skills and attitudes for each job competency level.

Each task was analyzed to determine the knowledge, skills and attitudes necessary to function successfully in the job. Based on the task analysis, competencies were written with criteria for measuring performance.

Phase VII

Development of curriculum guidelines for career mobility.

Phase VIII

Development and/or revision of curriculum materials based on the curriculum guidelines.

Curriculum materials were designed to provide assistance to instructors and administrators in implementing and teaching the curriculum. Materials include: (1) purpose of the curriculum; (2) course descriptions, course outlines and resource material; (3) staffing; (4) facility and equipment needs; (5) faculty needs; and (6) accreditation and certification information.

Evaluation Stage

Review and Evaluate. The competency-based curriculum development project was continuously reviewed and evaluated.

Formative Evaluation:

1. Survey of employers to determine jobs available.

2. Survey of employers, employees and educators to determine relevance of tasks to jobs.

3. Advisory committee consisting of employers and employees (representative community college/technical institute graduates) in the particular job and educator reviewed and evaluated information collected and materials produced at every stage of the process. They answered questions such as: How relevant are the competencies to the actual job? Is this a reasonable plan of study for this job level?

Summative Evaluation:

1. Curriculum committees consisting of educators from secondary and postsecondary institutions reviewed and evaluated materials as written by curriculum writers.

2. Final review and evaluation of all curriculum materials took place in workshops attended by instructors and students from all institutions in the system offering the particular curriculum. Materials were evaluated according to some predetermined criteria and other criteria that evolved during the development of the project. (See page 9 for example of general criteria.)

EXAMPLE ONLY

SUGGESTED

CURRICULUM MATERIALS CRITIQUE

Curriculum _____ Review Date _____

Career Opportunities Identified _____

Reviewer's Name (Optional) _____ Position _____

Please rate these curriculum materials as objectively as you can on the criteria listed below. Use the following rating:

1 - Very poor, should be completely revised (Specify under "comments")
2 - Poor, serious weakness (Specify under "comments")
3 - Not applicable
4 - good, average quality
5 - Outstanding, superior quality

I. Competencies (List of competencies for the specific curriculum to be evaluated.) — Rating: ____ — Comments/Suggestions for Revision: _____

1. Are all the competencies relevant to the career opportunities? If not, please explain:

2. Is there an obvious hierarchy of competencies within this material?

3. Are appropriate entry points indicated in the hierarchy of competencies for the following:

   a. Student with no previous experience or knowledge — Beginning level _____
   b. Student with previous education _____
   c. Student with previous work experience _____

4. Are appropriate exit points indicated in the hierarchy of competencies for the career opportunities identified?

Career Opportunities	Exit Points
_____	_____
_____	_____

II. Content

Use the rating scale to evaluate the following:

	Rating	Comments/Suggestions for Revision
1. Accuracy of content	____	_____
2. Relevance and appropriateness	____	_____
3. Depth of treatment for competencies desired	____	_____
4. Appropriate sequencing of content	____	_____

III. Learning Activities

Use the rating scale to evaluate the following:

	Rating	Comments/Suggestions for Revision
1. Variety of learning activities	____	_____
2. Provision for learner involvement	____	_____
3. Provision for feedback and reinforcement	____	_____

IV. Evaluation Criteria

Use the rating scale to evaluate the following:

	Rating	Comments/Suggestions for Revision
1. Is the evaluation criteria appropriate for measuring performance	____	_____

Revision. Final evaluation and recommendations for each curriculum were reviewed by the curriculum committee and curriculum materials revised incorporating the suggestions from the evaluation workshops.

Publication and Distribution. Competency-based curriculum materials were printed in an attractive, usable and easily revised format which was distributed to institutions at inservice workshops and through the mail. Sufficient copies were printed to allow for distribution to the fifty-seven institutions in North Carolina and to other state and federal agencies. Assistance will be provided by the Program Development staff further explaining use of materials and organizing inservice activities for instructors.

ORGANIZATION OF PROJECT COMMITTEES

Each phase of this project was designed to assure maximum involvement of employers, employees and educators. In order to assure involvement, the organization plan called for a curriculum committee and a curriculum advisory committee.

The curriculum committee was composed of instructors from the Community College System and from the Secondary System. The Presidents in the Community College System nominated persons from their institutions to serve on each curriculum committee. The Department of Public Instruction, Business and Office Education staff nominated persons from the secondary schools. This committee was a working committee and was responsible for writing and preparing all materials including the job title survey, task inventory survey, task analysis, competencies and curriculum materials.

The advisory committee was composed of members of the curriculum committee, employees and employers. This committee provided advice and council on specific questions concerning employment, methods and competency level and assisted in interpreting the survey data. Employers and employees on this committee were carefully selected to assure representation from all areas of business and office (secretarial) employment.

In addition to these committees, curriculum writers from the community colleges/technical institutes and secondary schools were used to assist in writing materials. All materials were reviewed by the Secretarial Science Competency-Based Committees.

NOBELS CURRICULUM PROJECT[1]

New Office and Business Education Learnings System (NOBELS) is a long-range curriculum renewal project. Utilizing a systems model, NOBELS' overall function is to assess and modify office learning programs.

The primary purpose of NOBELS was the development of an inventory of 373 educational specifications in behavioral terms that represent basic tasks performed by 16-24 year old office workers. The focus of each specification was behavior needed for office employment.

This purpose was completed through the identification of the following objectives:

1. Determining a framework for analyzing current and emerging office tasks
2. Isolating trends and concepts from emerging office occupations and practices and converting these to performance tasks
3. Developing a sampling design for collecting data from office work stations
4. Developing a procedure and a training program for data collection
5. Converting field data to performance tasks: primary (terminal), interim, and prevocational
6. Analyzing the data collected
7. Reporting a master list of performance tasks

Based on empiric data collected by personal interview from 1232 office employees and their supervisors from four areas of the United States, the educational specifications were drawn from 4564 basic tasks and 32, 447 steps of task performance.

CAREER OPPORTUNITY SURVEY

Selection of Subjects

A career opportunity survey was conducted to determine office occupations (secretarial and general office) available in North Carolina.

[1]Frank W. Lanham, Development of Task Performance Statements for A New Office and Business Education Learnings System (NOBELS), (Columbus: The Center for Vocational Education, Ohio State University, September, 1972.)

Subjects were randomly selected from the fifty-seven secretarial and general office programs offered in the community college system. Subjects were randomly selected from the secondary business and office education programs in each of the eight educational districts. Business and industry representatives were selected from the North Carolina Advisory Committee for Business and Office Education based on their expertise in the area of office occupations.

Since data collected in this study was not subject to sophisticated statistical analysis, a purposive sample was utilized and a small sample of thirty-one community colleges and technical institutes, five secondary schools and six business and office representatives was used.

The career opportunity survey of the selected business and industry representatives, secondary business and office coordinators and community college/technical institute secretarial and office coordinators was conducted by mail.

An additional survey form was included in the education coordinators' mailing in order to receive input from the local advisory committee chairperson and/or the advisory committee.

Design of Survey

The United States Office of Education Dictionary of Occupational Titles code numbers and occupational titles for office occupations were listed on the career opportunity survey. These job titles were representative of the office jobs reported in Lanham's 1972 research project, "Development of Task Performance Statements for a New Office and Business Education Learnings System," which was used as the base document in this project. Respondents were asked to indicate if these career opportunities do exist in North Carolina and also to indicate their opinion as to the level(s) at which the training should be available. (Refer to Appendix B-2 for example of form.)

Results of the Survey

The 55 percent of career opportunity survey forms returned represented a total of 54 respondents, which was predetermined to meet the small sample criteria. The occupational titles selected for the study were based on fifteen or more responses indicating that training should be available in both the high school and the community college/technical institute. Occupational titles identified as training responsibility of high school only or community college/technical institute only should be determined by the respective educational institutions at a later date. (Results of the survey are in Appendix B.)

CAREER OPPORTUNITIES IDENTIFIED

The career opportunities identified were clustered in four main categories - machine operators, typists, clerk and secretary - as shown in Table 1. Job descriptions for each job title are listed below.

The North Carolina career opportunities in secretarial and general office (office occupations) identified below are based on a Career Opportunity Survey of business and industry representatives. Job descriptions were abstracted from the Dictionary of Occupational Titles. D.O.T. numbers and some job titles have changed since the survey was completed; and, the new numbers and titles have been used in the list below. The jobs described are entry-level, mid-management and advanced level. Job experience or additional education may be essential for advanced level employment.

MACHINE OPERATORS

Computation

Adding-Machine Operator (D.O.T. 216.482-014)
An adding-machine operator computes details of business transactions using knowledge of arithmetic and electrically powered or lever-operated adding machine that automatically performs addition and subtraction and records results on paper tape. Other duties may include posting figures from tapes onto records or reports and verifying and recording totals of items on batch sheets.

Calculating-Machine Operator (D.O.T. 216.482-022)
The calculating-machine operator computes and records statistical, accounting and other numerical data utilizing knowledge of mathematics and using machine that automatically performs mathematical processes such as addition, subtraction, multiplication, division and extraction of roots. Other duties may include posting totals to records such as payrolls, inventories, invoices and summary sheets and verifying computations made by other workers.

Processing Data

Key-Punch Operator (D.O.T. 203.582-030)
The keypunch operator operates an alphabetic and numeric keypunch machine, similar in operation to an electric typewriter, to transcribe data from source material onto punchcards, paper, magnetic tape or magnetic cards and to record accounting or statistical data for subsequent processing by automatic or electronic data processing equipment. The operator may also check operations by a verifier; ie, inserts previously punched cards into card gage to verify registration of punches or verify data on tapes. Other duties may include operating machines that automatically sort, merge or match punchcards into specified groups.

Table 1

Office Occupations Identified for North Carolina

Category	D.O.T. Code	Job Title
Machine Operators		
Computation	216.482-014	Adding-Machine Operator
	216.482-022	Calculating-Machine Oper.
Processing Data	203.582-030	Keypunch Operator
	203.132-014	Transcribing Operator Supv.
	203.582-058	Transcribing Machine Oper.
Reprographics	207.682-014	Duplicating-Machine Oper. II
	207.682-018	Offset-Duplicating-Machine Operator
Typists	203.582-022	Data Typist
	203.582-038	Automatic Typewriter Oper.
	203.362-010	Clerk-Typist
	203.582-066	Typist
Clerk	215.482-010	Payroll Clerk
	206.362-010	File Clerk I
	206.367-014	File Clerk II
	214.382-014	Billing Typist (Billing Clerk II)
	219.362-010	Administrative Clerk (General Office Clerk)
	216.482-010	Accounting Clerk
	216.587-014	Posting Clerk
	209.562-010	General Clerk
	209.262-010	Correspondence Clerk
	237.367-010	Appointment Clerk
	237.367-038	Receptionist
	209.362-026	Personnel Clerk
Secretary	169.167-014	Administrative Secretary
	201.162-010	Social Secretary
	201.362-010	Legal Secretary
	201.362-014	Medical Secretary
	201.362-030	Secretary
	202.362-014	*Stenographer

*The advisory committee recommended that this job be classified as a clerical occupation.

Transcribing Operator Supervisor (Head Transcribing Operator)
(D.O.T. 203.132-014)
A head transcribing operator supervises and coordinates activities of transcribing-machine operators in business organizations. Duties may include: (1) studying work assignments and assigning duties to workers and establishing work schedules and designing methods to meet these schedules; (2) determining manpower requirements and recommending or initiating personnel actions such as hiring, promoting, transferring, discharging and disciplinary measures; (3) estimating materials and supplies needed for completion of work and requisitioning and inspecting these materials and supplies; (4) analyzing and resolving work problems; (5) preparing and submitting production, progress or other reports and (6) recommending measures to improve work methods, equipment performances, quality of product or service and working conditions.

Transcribing-Machine Operator (D.O.T. 203.582-058)
The transcribing-machine operator operates a typewriter to transcribe letters, reports or other recorded data heard through earphones of transcribing machine.

Reprographics

Duplicating-Machine Operator II (D.O.T. 207.682-014)
(Operator III has been deleted from Dictionary)
Duplicating-machine operators reproduce handwritten or typewritten matter directly from master copy, using duplicating machines. Machines frequently used are dual-lith, multilith, masterlith, mimeograph, dupligraph, multigraph, compotype, graphotype and Xerox.

Offset-Duplicating-Machine Operator (D.O.T. 207.682-018)
An offset-duplicating-machine operator operates offset-duplicating machines to reproduce single or multicolor copies of charts, schedules, bulletins and related matter according to oral instructions or layout and stock specifications on job order. Other duties may include: preparing printing plates and operating stencil-process or spirit-duplicating and photocopy machines and equipment.

TYPISTS

Data Typist (D.O.T 203.582-022)
A data typist operates special-purpose electric typewriter to convert alphabetic, numeric and symbolic data into coded form on punchcards or tapes. The typist types computer programs from worksheet and input data such as specified items from business forms, which the machine converts to holes or magnetic impulses on cards or tapes. The typed copy is proofread in order to identify errors and retyped if necessary. The work of a data typist is similar to that of a keypunch operator.

Automatic Typewriter Operator (D.O.T. 203.582-038)
The automatic typewriter operator operates one or more automatic typewriters that reproduces material from perforated tape or paper, such as letters, reports and other data.

Clerk-Typist (D.O.T. 203.362-010)
The clerk-typist compiles data and operates typewriter in performance of routine clerical duties to maintain business records and reports. Clerical work may include: (1) typing of correspondence, reports, bills, application forms, shipping tickets and other matters from office records; (2) filing records and reports; (3) posting information to records; (4) proofreading typed material; (5) sorting and distributing mail; (6) answering the telephone and (7) sometimes using office machines.

Typist (D.O.T. 203.582-066)
A typist types letters, reports, stencils, forms, addresses or other straight-copy material from rough draft or corrected copy. Duties may include verifying totals on report forms, requisitions or bills and operating duplicating machines to reproduce copy.

CLERK

Payroll Clerk (D.O.T. 215.482-010)
A payroll clerk computes wages and posts wage data to payroll records using a calculator. Other duties may include: (1) operating posting machine; (2) entering net wages on earning record card, check, check stub, and payroll sheet; (3) preparing periodic reports of earnings and income tax deductions; (4) preparing and distributing pay envelopes and (5) preparing time records.

File Clerk I (D.O.T. 206.362-010)
A file clerk files correspondence, cards, invoices, receipts and other records in alphabetical or numerical order or according to subject matter or other system. Other duties include: (1) reading incoming material and sorting according to file system, (2) locating and removing materials from files when requested, (3) keeping records of materials removed and (4) typing indexing information on folders.

File Clerk II (D.O.T. 206.367-014)
File Clerk II performs essentially same duties with exception of also performing clerical work in searching and investigating information contained in files, inserting additional data on file records, making up reports and keeping files current.

Billing Typist (Billing Clerk II) (D.O.T. 214.382-014)
A billing typist compiles data and operates typewriter to prepare invoices and bills of lading. Duties include: (1) computing to compile amounts due from records such as purchase orders, sales tickets and charge slips using adding or calculating machine; (2) typing invoices; (3) typing bills of lading; (4) typing shipping labels and (5) typing credit memorandums and credit forms.

Administrative Clerk (General Office Clerk) (D.O.T. 219.362-010)
An administrative clerk compiles and maintains records of business transactions and office activities of establishment by performing a variety of the following or similar clerical duties and utilizing knowledge of systems or procedures: (1) copies data and compiles records and reports; (2) tabulates and posts data in record books; (3) computes wages, taxes, premiums, commissions and payments; (4) records orders for merchandise or service; (5) gives information to and interviews customers, claiments, employees and sales personnel; (6) receives, counts and pays out cash; (7) prepares, issues and sends out receipts, bills, policies, invoices, statements and checks; (8) operates office machines such as typewriter, adding, calculating and duplicating machines; (9) opens and routes incoming mail, answers correspondence and prepares outgoing mail; (10) may take dictation; (11) may prepare payroll; (12) may keep books and (13) may purchase supplies.

Accounting Clerk (D.O.T. 216.482-010)
An accounting clerk performs any combination of routine calculating, posting and verifying duties to obtain primarily financial data for use in maintaining accounting records. Duties may also include typing vouchers, invoices, account statements, payrolls, periodic reports and other records and reconciling bank statements.

Posting Clerk (D.O.T. 216.587-014)
A posting clerk records business transactions in journals, ledgers and on special forms and transfers entries from one accounting record to another. Duties include recording of information such as date, address, identification number, purchase orders, invoices, checks or disposition of correspondence and may also include computing debits and credits using calculating or adding machine.

General Clerk (D.O.T. 209.562-010)
A general clerk performs any combination of the following and similar clerical tasks requiring limited knowledge of systems or procedures: (1) writes or types bills, statements, receipts, checks or other documents, copying information from one record to another; (2) proofreads records or forms; (3) counts, weighs or measures material; (4) sorts and files records; (5) receives money from customers and deposits in bank; (6) addresses envelopes or packages by hand, with typewriter or addressograph machine; (7) stuffs envelopes by hand or with envelope stuffing machine; (8) answers telephone, conveys messages and runs errands; (9) stamps, sorts and distributes mail; (10) stamps or numbers forms by hand or machine and (11) copies documents, using duplicating equipment.

Correspondence Clerk (D.O.T. 209.262-010)
A correspondence clerk composes letters in reply to correspondence concerning such items as requests for merchandise, damage claims, credit information, delinquent accounts, incorrect billing, unsatisfactory service or to requests for information. The clerk also types letters, dictates reply or selects and completes form letters.

Appointment Clerk (D.O.T. 237.367-010)
An appointment clerk schedules appointments with employer or other employees for clients or customers by mail, phone or in person and records time and date of appointment in appointment book. Other duties may include telephoning or writing clients to remind them of appointments, receiving payments for service and recording them in ledger, receiving callers and operating switchboard.

Receptionist (D.O.T. 237.367-038)
A receptionist receives callers coming into the office or building, determines nature of business and directs callers to destination. Other duties may include: (1) issuing visitor's pass, (2) making future appointments and answering inquiries, (3) performing a variety of clerical duties and (4) collecting and distributing mail and messages.

Personnel Clerk (D.O.T. 209.362-026)
A personnel clerk compiles and keeps personnel records. Duties may include: (1) operating calculating machine; (2) administering and scoring aptitude, personality and interest tests; (3) completing and explaining bonding application required by company and (4) preparing and filing accident and injury reports.

*Stenographer (D.O.T. 202.362-014)
The stenographer takes dictation for correspondence, reports and other matter by manual methods such as shorthand or by stenotype machines and transcribes dictated matter, using typewriter. Stenographers may also transcribe material from tape recording, dictating machines or other sound recording devices. Stenographers may work (1) as members of a stenographic pool, (2) in a particular profession such as medical, legal, engineering, technical or scientific, (3) in foreign languages or (4) as public stenographers. Stenographers also perform a variety of clerical duties such as dealing with mail, operating machines, filing and other general clerical and routine office tasks.

*The advisory committee recommended that this job be classified as a clerical occupation.

SECRETARY

Administrative Secretary (D.O.T. 169.167-014)
An administrative secretary keeps official corporation records and executes administrative policies determined by or in conjunction with other officials. Duties include: (1) prepares memorandums outlining and explaining administrative procedures and policies to supervisory workers; (2) plans conferences; (3) directs preparation of records such as notices, minutes and resolutions for stockholders' and directors' meetings; (4) directs recording of company stock issues and transfer; (5) directs preparation and filing of corporate legal documents with government agencies to conform with statutes and (6) depending on organization, works in line or staff capacity.

Social Secretary (D.O.T. 201.162-010)
A social secretary coordinates social, business and personal affairs of employer. Duties include: (1) Conferring with employer on contemplated social functions, sends invitations and arranges for decorations and entertainment; (2) advising employee on etiquette, dress and current events and (3) reading and answering routine correspondence, typewritten or own handwriting.

Legal Secretary (D.O.T. 201.362-010)
A legal secretary prepares legal papers and correspondence of legal nature, such as summonses, complaints, motions and subpoenas. Duties may also include: reviewing law journals and other legal publications to identify court decisions pertinent to pending cases and submitting articles to company officials.

Medical Secretary (D.O.T. 201.362-014)
A medical secretary performs secretarial duties utilizing knowledge of medical terminology and hospital, clinic or laboratory procedures. Duties may include: (1) taking dictation in shorthand or using transcribing machine; (2) compiling and recording medical charts, reports; (3) corresponding, using typewriter and preparing and sending bills to patients and (4) recording appointments.

Secretary (D.O.T. 201.362-030)
A secretary schedules appointments, gives information to callers, takes dictation and otherwise relieves officials of clerical work and minor administative and business detail. Duties may include: (1) reading and routing incoming mail; (2) locating and attaching appropriate file to correspondence to be answered by employer; (3) taking dictation in shorthand or by machine and transcribing on typewriter; (4) composing and typing routine correspondence; (5) files correspondence and other records; (6) answering telephone; (7) scheduling appointments for employer; (8) greeting visitors, ascertaining nature of business and conducting visitors to employer or appropriate person; (9) arrange travel schedule and reservations; (10) compiling and typing statistical reports; (11) overseeing clerical workers; (12) keeping personnel records; (13) recording minutes of staff meetings; (14) making copies of correspondence or other printed matter, using copying or duplicating machine and (15) preparing outgoing mail using postage-metering machine.

*Stenographer (D.O.T. 202.362-014)
(Refer to page 18.)

EMPLOYMENT PROJECTIONS

In North Carolina's Employment Security Commission report of October 1976, clerical workers ranked among the highest annual average job needs in North Carolina in the 1974-85 period. The 40 percent employment increase of clerical workers will be the largest gain of any of the major occupational groupings. Within the clerical area, the largest numerical employment increase over the eleven-year period will be in the secretarial occupations. Table 2 shows some of the clerical occupations figures for 1974 with projections.

Table 2*

Total Employment in North Carolina by Clerical Occupations
1974, 1977, 1978 and Projections to 1985

OCCUPATION	1974	1977	1978	Projected 1985
Clerical workers	317,680	352,290	363,830	444,590
Stenographers, typists, secretaries	88,000	100,640	104,850	134,320
Secretaries, legal	1,890	2,180	2,270	2,930
Secretaries, medical	1,970	2,340	2,460	3,330
Secretaries, other	69,010	79,730	83,310	108,340
Stenographers	1,820	1,720	1,680	1,450
Typists	13,320	14,670	15,120	18,260
Office machine operators	13,120	13,460	13,580	14,380
Bookkeeping, billing operators	1,020	1,060	1,080	1,170
Calculating machine operators	350	360	370	390
Computer, peripheral equip. oper.	4,570	5,050	5,200	6,310
Duplicating machine operators	310	330	340	380
Keypunch operators	5,820	5,570	5,480	4,900
Tabulating machine operators	**	**	**	**
Other office machine operators	980	1,040	1,060	1,200
Other clerical workers	216,560	238,200	245,410	295,890
Billing clerks	3,730	4,250	4,420	5,620
File clerks	3,700	3,920	4,000	4,520
Payroll, time keeping clerks	5,010	5,510	5,680	6,850
Receptionists	9,230	10,320	10,680	13,230

*Abstracted from "North Carolina Employment Projections to 1985," pages 35-6.
**Total employment between 1970-1980 was under 100.

CHAPTER III

SECONDARY BUSINESS AND OFFICE EDUCATION

PROGRAMS IN NORTH CAROLINA

PROGRAM DESCRIPTION

The mission of Business and Office Education at the secondary level is to provide for male and female students meaningful instruction for and about business.

Instruction in this program encompasses business skills, techniques, economic understandings and attitudes necessary to enable students to participate in our economy as wage earners and consumers.

Emphasis is given to the following areas of study: accounting and computing, business data processing, management, information communications, general clerical skills, stenography, typewriting, economics, business law, business techniques and desirable business ethics and attitudes.

MAJOR PROGRAM OBJECTIVES

At the secondary level, programs in Business and Office Education are designed to provide:

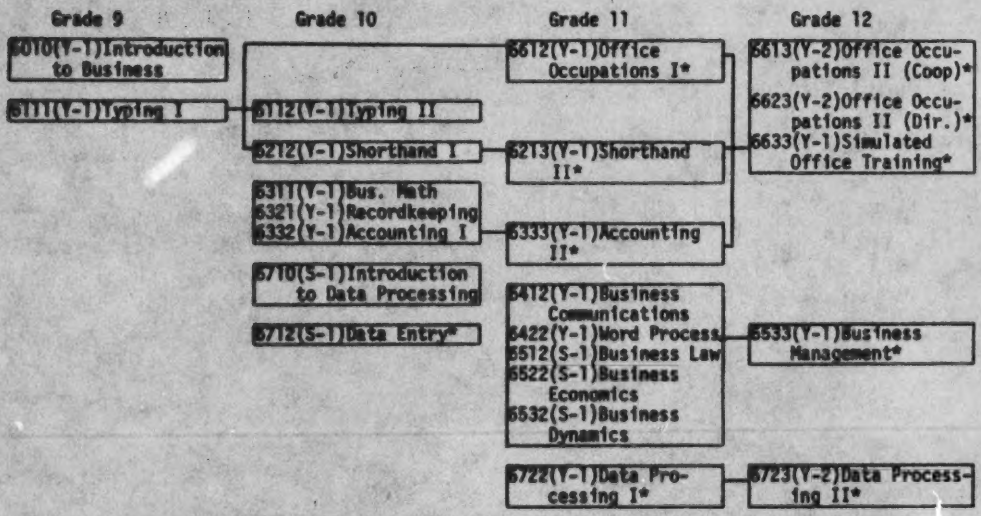
1. For the development of occupational skills necessary for initial employment and advancement in a business career.
2. For the development of economic understanding needed for intelligent participation in our economic system of free enterprise.
3. Background information for further study in the field of business.

SCOPE AND SEQUENCE OF

BUSINESS AND OFFICE EDUCATION

The Scope and Sequence Chart on page two depicts the total Business and Office Education program. The chart indicates the first grade level at which each course may be offered. Introduction to Business (6010) must be offered to have a complete Business and Office Education program. Adaptations will need to be made for those students who enter a sequence or career pattern later than Grade 9.

SCOPE AND SEQUENCE CHART



*NOTE: Any vocationally certified business instructor teaching one of these courses no less than one period a day is eligible for vocational reimbursement. In addition, for reimbursement purposes, all other courses taught by the instructor must be one of these on the Business and Office Scope and Sequence Chart.

Courses. Courses in Business and Office Education have been designed as: (1) semester courses, (2) two-semester courses and (3) two-year courses. Two-semester and two-year courses must be taken in sequence. It may not be practical or appropriate, however, for every student who starts such a set of courses to complete the set; this will depend on student ability and career objective.

Additional information contained in Education for Business, Revised, the business and office curriculum guide, includes suggested course sequences for each of five career patterns (accounting, business management, clerical, data processing and stenographic) and indicates which courses are needed for minimum and maximum proficiency and which courses provide enrichment. Other patterns may be developed as needs dictate.

Also included in the curriculum guide are suggestions for developing programs for small, medium and large schools.

Small school. The recommended minimum sequence of course offerings for a small school (1-2 teachers) consists of Introduction to Business, Business Math, Typewriting I and II, Shorthand I, Accounting I, Office Occupations I and Simulated Office Training. In a one-teacher department, it will not be possible to offer each of these courses for a full year; therefore, the following adjustments are recommended:

1. Offer Shorthand I and Accounting I in alternate years.

2. Offer Introduction to Business and Business Math as semester courses.

3. Integrate Typewriting II and Office Occupations I at Grade 11.

A program designed according to the above suggestions will enable the student to develop minimum job-entry skills for clerical, stenographic or accounting jobs.

Medium-size school. In a medium-size school (3-5 business teachers) Office Occupations II (Cooperative and/or Directed) should be offered instead of, or in addition to, Simulated Office Training. Also, the second year of shorthand and accounting should be scheduled as student interest warrants. In addition, the program should be expanded to include Business Communications or Word Processing, Business Law, Business Economics, Introduction to Data Processing and Business Management. This will enable students to develop more advanced job-entry skills for clerical, stenographic and accounting jobs; will prepare them for management trainee positions and will assist them in identifying an interest in a career in data processing.

Large school. The business program in a large high school (with six or more business teachers) will include all courses shown on the Scope and Sequence Chart insofar as manpower needs warrant and resources will permit.

With adequate planning and counseling, the student may enter and progress through one of the career patterns and achieve the objectives of the program. The introductory courses in the Business and Office Education sequence (Introduction to Business, Business Mathematics and Typewriting I) are the beginning courses in each of the career patterns. This enables the student to learn more about business and some of the skills, knowledges and attitudes needed for a career in the business world before choosing an area of specialization in the field of business. Additional flexibility is permitted since students may, in some cases and within some limitations, shift from one pattern to another.

To provide additional flexibility in planning student-centered programs, some courses traditionally structured as year courses are recommended as semester courses.

Equipment and facilities. Within the instructional program, efforts are made to provide instructional equipment and facilities comparable to those found in the business community. In-school laboratories simulating business conditions provide the environment for realistic learning experiences. In addition to the in-school laboratories, alternative approaches to instruction make it possible for students to achieve program objectives through on-the-job work experience in a cooperative course or through internship in accounting or management.

Student organization. Opportunities for leadership development and application of class learning are provided through student participation in FBLA (Future Business Leaders of America), the organization for all Business and Office Education students.

Work experience. The work experience component of the Business and Office Education program of instruction is coordinated and supervised by one or more teacher coordinators. For those teacher coordinators in a cooperative work experience program, completion of duties in order to meet minimal standards of quality will require time both within and beyond the regular school day. Coordinating on-the-job training and classroom instruction for each individual student requires many hours of planning, preparation and implementation of individual student plans. Organizing leadership activities through FBLA requires planning meetings, both at the local and district levels, some of which may occur in the late afternoon or at night. Duties assigned to business teachers and teacher coordinators outside the program area should include those which enhance rather than conflict with their primary responsibilities.

Planning. In identifying standards for planning specific course content and core competencies, reference should be made to Education for Business, Revised.

For further information, contact: Chief Consultant
Business and Office Education
Division of Vocational Education
Department of Public Instruction
Raleigh, NC 27611
(919) 733-7985

BUSINESS AND OFFICE EDUCATION COURSES

The course descriptions on pages 7-11 outline the course offered through secondary business and office education programs, the grade levels at which they are taught and the amount of classtime involved.

OUTPUT STANDARDS

Core output standards (knowledge, skill and attitude competencies) for secondary business and office education graduates are shown on pages 13-16.

TEXTBOOKS

The state adopted textbooks for secondary business and office education are on pages 17-20.

Following are course descriptions for Business and Office Education. Below is an example of a course description and a key for interpreting the information included.

BOE 6710(S-1) Credit: 1/2 (10-12) EnR: 12-18
275 min./wk. - 18 wks.

DATA ENTRY

This course is designed to develop a salable skill in the operation of data entry equipment - manual, mechanical, and electronic. A study of the role data entry operations play in a business environment and the types of data entry equipment is also included.
Prerequisite: Typewriting I (6111)

KEY:

BOE = Program Area Abbreviation
DATA ENTRY = Title of Course
6710 = State Course Number - (The last digit denotes level of the course in terms of skill development sequence) Course numbers ending in 0 = Introductory course, Grade 9; 1 = Level I course in a sequence, 2 = Level II course in a sequence; 3 = Level III course in a sequence
(S-1) = Length of course; time block in number hours per day -- Y-1: 1 year, 1 hour per day; Y-2: 1 year, 2 hours per day; Y-3: 1 year, 3 hours per day; S-1: 1 semester, 1 hour per day
Credit: 1/2 = Number of Units of Credit
(10-12) = Grade level at which students may first enroll in course
EnR: 12-18 = Enrollment Range (minimum-maximum range for class size)
275 min./wk. = No. of minutes in class per week
18 wks. = Length of course in no. of weeks
"Content Description" = Description of the purpose and major units of instruction included
Prerequisite(s) = Course prerequisites by state course number and title

BOE 6010(Y-1) Credit: 1 (9-10) EnR: 12-35
275 min./wk. - 36 wks.

INTRODUCTION TO BUSINESS

SEMESTER 1: This introductory course is a study of the role of business in our free enterprise system with major emphasis on the individual as a consumer, worker, producer, and well-informed citizen. Areas of study include the free enterprise system; business and the consumer; insurance; banking; credit; investments; personal money management; business terminology; the interrelationship of government, business, and labor; and career opportunities in business.
Prerequisite: None

SEMESTER 2: This course is designed to use the project approach in reinforcing the concepts presented in Introduction to Business, Semester 1.
Prerequisite: Introduction to Business (6010), Semester 1

BOE 6111(Y-1) Credit: 1 (9-12) EnR: 12-35
275 min./wk. - 36 wks.

TYPEWRITING I

SEMESTER 1: This course is designed to enable students to develop the ability to operate the typewriter using the touch method. The fundamentals of typewriting are the same regardless of ultimate usage. Students learn to arrange, in typewritten form, problem copy such as tables, business and personal letters, reports, manuscripts, and outlines. Special emphasis is given to word division, spelling, punctuation, capitalization, numbers, and symbols.
Prerequisite: None

SEMESTER 2: This course is designed to continue the development of basic typewriting skills with concentrated application of these skills to the production of business correspondence, forms, and reports.
Prerequisite: Typewriting I (6111), Semester 1

BOE 6112(Y-1) Credit: 1 (10-12) EnR: 12-35
275 min./wk. - 36 wks.

TYPEWRITING II

SEMESTER 1: This course provides additional practical problem-solving experiences in the preparation of advanced reports, correspondence, tables, and forms. Concentration on the solution of typewriting problems is stressed to improve production rate in daily work situations. Units of instruction are designed to meet individual levels of competency.
Prerequisite: Typewriting I (6111)

SEMESTER 2: This course is designed to refine typewriting and language art skills through application in realistic projects in a variety of task and job simulations. Emphasis is given to the development of decision-making skills.
Prerequisite: Typewriting II (6112), Semester 1

BOE 6212(Y-1) Credit: 1 (10-12) EnR: 12-35
275 min./wk. - 36 wks.

SHORTHAND I

SEMESTER 1: This course covers the fundamentals of shorthand. It is designed to develop fluency in reading shorthand plate material and notes rapidly and accurately and the ability to write practiced and previewed dictation and to transcribe meaningful typewritten copy. Primary emphasis is on the presentation and practice of the principles and theory as a foundation for advanced dictation and transcription in later semesters. Typewriters must be available for student use.
Prerequisite: Typewriting I (6111), and a working knowledge of English grammar and mechanics as measured by pretest.

SEMESTER 2: This course is designed to review and build on the fundamentals of shorthand and to develop fluency in writing shorthand notes rapidly and accurately from previewed new-matter dictation. Emphasis is placed on the development of correct machine transcription techniques and the production of typewritten mailable copy. Typewriters must be available for student use.
Prerequisite: Shorthand I (6212), Semester 1

BOE 6213(Y-1) Credit: 1 (11-12) EnR: 12-30
275 min./wk. - 36 wks.

SHORTHAND II

SEMESTER 1: This course is designed to further refine skills in shorthand, typewriting, and language arts, and to apply these skills in the production of mailable typewritten transcripts. Emphasis is placed on developing the ability to take dictation of previewed new material at increasingly higher speeds for longer periods of time and to transcribe mailable copy at acceptable job-entry rates. Typewriters must be available for student use.
Prerequisite: Shorthand I (6212)

SEMESTER 2: This course provides refinement of shorthand skills and their integration with other types of secretarial procedures. Emphasis is on the further development of dictation and transcription skills and of desirable work habits, attitudes, and character traits necessary for employment in the business office. Typewriters must be available for student use.
Prerequisite: Shorthand II (6213), Semester 1

BOE 6311(Y-1) Credit: 1 (10-12) EnR: 12-35
275 min./wk. - 36 wks.

BUSINESS MATHEMATICS

SEMESTER 1: This course is designed to enable the student to improve computational skills and to apply these skills in the performance of office tasks. Areas of study include basic skills review, cash records, banking, buying, selling, and credit. Appropriate business forms are used in each unit. Adding machines and/or calculators must be available for student use.
Prerequisite: None

SEMESTER 2: This course is designed to permit continued improvement in computational skills and continued application of these skills in the performance of office tasks. Areas of study include payroll, income tax, investments and capital, business graphs, and computer mathematics. Appropriate business forms are used in each unit. Adding machines and/or calculators must be available for student use.
Prerequisite: Business Mathematics (6311), Semester 1

BOE 6321(Y-1) Credit: 1 (10-12) EnR: 12-35
275 min./wk. - 36 wks.

RECORDKEEPING

SEMESTER 1: This course is designed to prepare students for occupations requiring a variety of clerical accounting skills. Students gain insight into the organization, operation, and control of business through the use of a series of fundamental recording activities. Learning activities that provide for review and reinforcement of computational skills are interwoven into the course content. Areas of study include personal recordkeeping and income taxes, cashier records, petty cash, banking, sales and purchases. Adding machines and/or calculators must be available for student use.
Prerequisite: Business Math (6311) or pre-test equivalency

SEMESTER 2: This course expands the study of recordkeeping into the areas of payroll, filing, automation, and introduction to the theory of accounting. It is designed to enable the student to develop a job-entry skill in single-entry recordkeeping and also may provide a foundation for further study in double-entry accounting. Adding machines and/or calculators must be available for student use.
Prerequisite: Recordkeeping (6321), Semester 1

BOE 6332(Y-1) Credit: 1 (10-12) EnR: 12-35
275 min./wk. - 36 wks.

ACCOUNTING I

SEMESTER 1: This course provides an understanding of the basic principles of the accounting cycle from the analysis and recording of business transactions to the preparation and interpretation of financial statements and supporting data. Adding and/or calculating machines must be available for student use.
Prerequisite: Business Mathematics (6311) or pre-test equivalency

SEMESTER 2: This course is a continuation of the study of the basic principles of the accounting cycle, including an introduction to flow charts and systems. Instruction emphasizes the "why" as well as the "how." Attention is given to payroll, taxes, data processing, special business transactions, and the basic types of business ownership. Adding and/or calculating machines must be available for student use.
Prerequisite: Accounting I (6332), Semester 1

BOE 6333(Y-1) Credit: 1 (11-12) EnR: 12-25
275 min./wk. - 36 wks.

ACCOUNTING II

SEMESTER 1: This course emphasizes the use of business papers, forms, and reports involved in keeping financial records. It enables students to develop skills in analyzing and interpreting information concerning business problems common to partnerships, preparing formal statements and supporting schedules, using voucher systems and coding, and using inventory control and budgetary control systems. Adding and/or calculating machines must be available for student use.
Prerequisite: Accounting I (6332)

SEMESTER 2: This course provides the student with an opportunity to develop in-depth knowledge of accounting procedures and techniques utilized in solving business problems and making financial decisions. It also provides the student an opportunity to analyze managerial problems using accounting information as a tool. Greater emphasis is given to analysis, interpretation, and synthesis. Adding and/or calculating machines must be available for student use.
Prerequisite: Accounting II (6333), Semester 1

BOE 6412(Y-1) Credit: 1 (11-12) EnR: 12-35
275 min./wk. - 36 wks.

BUSINESS COMMUNICATIONS

SEMESTER 1: This course is designed to enable prospective business and office employees to develop oral and written skills, attitudes, and behavior habits needed for successful employment. Areas of study include review of basic language skills and types of oral and written business communications. Activities involve the use of practical applications of communications used in business. Typewriters must be available for student use.
Prerequisite: Typewriting I (6111)

SEMESTER 2: This course is designed to provide in-depth review of basic language skills and advanced practical applications of concepts and skills included in Business Communications, Semester 1. Additional areas of study include more difficult types of business letters, job application, reports, minutes, summaries, parliamentary procedure, and introduction to word processing concepts. Typewriters must be available for student use.
Prerequisite: Business Communications (6412), Semester 1

BOE 6422(Y-1) Credit: 1 (11-12) EnR: 12-18
275 min./wk. - 36 wks.

WORD PROCESSING

SEMESTER 1: This course provides a thorough background of word processing concepts, communication skills, mechanical skills, and career opportunities. Integrated and simulated projects cover language arts, decision making, problem solving, dictation, machine transcription, and the proportional spacing typewriter.
Prerequisite: Typewriting I (6111)

SEMESTER 2: This course expands the concepts and varied components of word processing to give the student a broad overview of the communications area and an introduction to the qualifications and responsibilities of a supervisor, an administrative assistant, a correspondence secretary, and an administrative secretary. Electronic and magnetic control word processing equipment is utilized in this course.
Prerequisite: Word Processing (6422), Semester 1

BOE 6512(S-1) Credit: 1/2 (11-12) EnR: 12-35
275 min./wk. - 18 wks.

BUSINESS LAW

This course is designed to acquaint students with the basic legal principles common to business activities, including origin and development of law, contracts, business relationships, law of property, business organizations, and the law of negotiable instruments.
Prerequisite: None

BOE 6522(S-1) Credit: 1/2 (11-12) EnR: 12-35
275 min./wk. - 18 wks.

BUSINESS ECONOMICS

This course is designed to provide students with an understanding of advanced economic concepts that will enable them to participate in a free enterprise system as wage earners, business owners, producers, and investors. Topics include advanced economic concepts, the free enterprise system, economic security, comparison of economic systems, and current economic issues.
Prerequisite: None

BOE 6532(S-1) Credit: 1/2 (11-12) EnR: 12-35
275 min./wk. - 18 wks.

BUSINESS DYNAMICS

This study of personality adjustment and human relations is designed to help each student understand self and others and to achieve more satisfying results in carrying out duties and responsibilities in every activity that involves people interaction. Topics include personal development, personal analysis, working with others, supervision of other employees, and leadership development.
Prerequisite: None

BOE 6533(Y-1) Credit: 1 (12) EnR: 12-30
275 min./wk. - 36 wks.

BUSINESS MANAGEMENT

SEMESTER 1: This course is designed to introduce the basic concepts of management. Topics include a general overview of American business, forms of business ownership, management functions, personnel management, labor-management relations.
Prerequisite: Introduction to Business (6010)

SEMESTER 2: This course is designed to continue and expand the study of those concepts presented in Business Management, Semester 1. Topics include the major aspects of business operation; trends in policies, procedures, and philosophies of business management; the role of management in the growth of American business; adapting to change; decision making; public relations; and human relations. Through observation, simulation, and/or internship activities practical applications are integrated into the course content.
Prerequisite: Business Management (6533), Semester 1

BOE 6612(Y-1) Credit: 1 (11) EnR: 12-25
275 min./wk. - 36 wks.

OFFICE OCCUPATIONS I

This course is designed to provide the student with a background for further study and job preparation in Office Occupations II or Simulated Office Training. Areas of instruction include the organization and functions of offices, employment opportunities in business, behavior and grooming, information processing concepts, handling the mail, business machines, oral communication skills, reprographics, cash control systems, inventory systems, receptionist duties, reference materials, filing, employment procedures, and job simulations. Review of language art, computation, and typewriting skills is integrated with other instructional units.
Prerequisite: Typewriting I (6111)

BOE 6613(Y-2) Credit: 3 (12) EnR: 12-25
550 min./wk. - 36 wks.

OFFICE OCCUPATIONS II - COOPERATIVE

This two-hour-block course combines classroom instruction with work experience in a business office. Instruction in a simulated office setting includes the areas of office efficiency, meeting office production standards, records management, interpersonal relationships, word processing skills and concepts, personal taxes, handling meetings and conferences, travel and accommodation services, payroll, purchases and accounts payable systems, sales and accounts receivable systems, and written communications. Review and refinement of communication, computation, and typewriting skills are integrated with the instructional units through the use of office simulations. In addition, students receive practical work experience in business offices with job-related classroom instruction designed in the form of individualized remedial and enrichment learning activities.
Prerequisite: Office Occupations I (6612) or Data Processing I (6722) or Accounting I (6332) depending on student career objective.

BOE 6623(Y-2) Credit: 2 (12) EnR: 12-25
550 min./wk. - 36 wks.

OFFICE OCCUPATIONS II - DIRECTED

This two-hour-block course combines classroom instruction with meaningful in-school office work experience. Classroom instruction in a simulated office setting includes the areas of office efficiency, meeting office production standards, records management, interpersonal relationships, word processing skills and concepts, personal taxes, handling meetings and conferences, travel and accommodation services, payroll, purchases and accounts payable systems, sales and accounts receivable systems, and written communications. Review and refinement of communication, computation, and typewriting skills are integrated with the instructional units through the use of office simulations. In addition, students receive practical work experience in school offices. Individualized remedial and other enrichment learning activities are also used.
Prerequisite: Office Occupations I (6612) or Data Processing I (6722) depending on student career objective

BOE 6633(Y-1) Credit: 1 (12) EnR: 12-20
275 min./wk. - 36 wks.

SIMULATED OFFICE TRAINING

This course is designed for those schools unable to schedule a two-hour-block course. It enables the student to develop and improve office technical skills, work habits, human relations, and personal qualities necessary for employment in a business office. Areas of instruction include the functions of the office, interpersonal relations, payroll systems, sales and accounts receivable systems, purchases and accounts payable systems, word processing skills and concepts, written communications, and job simulations. Review and refinement of communication, computational, and typewriting skills are integrated with other instructional units through the use of simulated projects.
Prerequisite: Office Occupations I (6612)

BOE 6710(S-1) Credit: 1/2 (10-12) EnR: 12-35
275 min./wk. - 18 wks.

INTRODUCTION TO DATA PROCESSING

This course is designed to introduce the basic concepts of data processing. Major emphasis is placed on understanding the fundamental principles applicable to the processing of information. Major content areas include the history of the computing industry, impact of computers on businesses and individuals, input/output media, survey of computer languages and equipment, and data processing careers. This course does not require equipment.
Prerequisite: None

BOE 6712(S-1) Credit: 1/2 (10-12) EnR: 12-18
275 min./wk. - 18 wks.

DATA ENTRY

This course is designed to develop a salable skill in the operation of data entry equipment - manual, mechanical, and electronic. A study of the role data entry operations play in a business environment and the types of data entry equipment is also included.
Prerequisite: Typewriting I (6111)

BOE 6722(Y-1) Credit: 1 (11-12) EnR: 12-25
275 min./wk. - 36 wks.

DATA PROCESSING I

This course is designed to provide students with the concepts of data processing, fundamentals of input/output media, impact of computers on businesses and individuals, employment opportunities in data processing, flowcharting, and a basic understanding of current computer programming languages. A computer or computer terminal is used for hands-on operational experiences. A student who has successfully completed Introduction to Data Processing may enroll in the second semester of this course.

Prerequisite: None

BOE 6723(Y-2) Credit: 2 (12) EnR: 12-20
550 min./wk. - 36 wks.

DATA PROCESSING II

This course is designed to teach electronic data processing systems and procedures. Students will write programs in several programming languages and will operate the computer system. Each program prepared by a student is increasingly difficult and should relate to the business world as well as to the student's desired field of employment. Concentrated independent study concepts and simulations are utilized.

Prerequisite: Data Processing I (6722)

The following suggested guidelines and standards reflect professional opinion concerning generally accepted achievement levels in cooperative and directed office occupations.

On a variety of written and performance tests, the student will demonstrate vocational competency necessary for employment in the area of office occupations.

For convenience, the following categories of standards are based on the various aspects of office duties and routines.

		1	2	3	4
K.	**ADDING AND CALULATING MACHINES**				
( ) 163.	List from columnar figures 80- to 100-keys-per-minute rate.				
( ) 164.	Tabulate 50 handwritten checks in one minute or less--no errors.				
( ) 165.	Operate the ten-key adding machine allowing ten minutes to solve ten simple addition and ten subtraction problems with 100 percent accuracy using correct fingering sub-total, non-add and repeat keys.				
( ) 166.	Operate the calculator allowing 15 minutes to solve ten simple multiplication, accumulative multiplication, three-factor multiplication or constant multiplication and ten division problems with 100 percent accuracy using correct fingering.				
L.	**APPLIED OFFICE MATHEMATICS**				
( ) 167.	Demonstrate knowledge of departmental purchases and sales, commissions, and piece work as related to payroll computations.				
( ) 168.	Perform accurate (95 percent or better) calculations of simple payrolls, discounts and prices, interest rates, and interest yields.				
( ) 169.	Perform accurate (95 percent or better) calculations of deferred payments and charges, discount and discount rates on notes and drafts.				
( ) 170.	Demonstrate knowledge of the simple types of insurance and tax computations.				
M.	**BUSINESS BEHAVIOR**				
( ) 171.	List five personal characteristics desired in an office employee.				
( ) 172.	Demonstrate knowledge of basic office customs and acceptable personal habits.				
( ) 173.	Demonstrate acceptable appearance and clear, distinct speech.				
( ) 174.	Demonstrate willingness to strive for self-improvement.				
( ) 175.	Demonstrate ability to work independently, organize work, and recognize superior-subordinate relationships.				
( ) 176.	Solve three situations involving human relations problems in the office that might occur during a business day by choosing the best solution to each problem from a prepared list.				
( ) 177.	Identify the personal traits or character changes that would be necessary to correct an undesirable office situation that has resulted directly from inappropriate behavior.				

		1	2	3	4
N.	**LANGUAGE SKILLS**				
( ) 178.	Know meaning, use, and spelling of general business terms and most frequently used data processing terms.				
( ) 179.	Demonstrate knowledge of mechanical factors: punctuation; capitalization; abbreviations; hyphenation; and grammar--agreement of voice, number, and person.				
( ) 180.	Demonstrate ability to construct sentences and use phrases and clauses correctly.				
O.	**COMMUNICATIONS--ORAL AND WRITTEN**				
( ) 181.	Demonstrate knowledge and understanding of the fundamental principles of effective communication.				
( ) 182.	Identify types of telephone services and equipment available.				
( ) 183.	Demonstrate ability to listen attentively.				
( ) 184.	Respond to hypothetical descriptions of office situations using correct telephone techniques for greetings, referrals, screening, making appointments, routing and terminating calls.				
( ) 185.	Select the correct type of call to be used for given situations.				
( ) 186.	Receive callers in a pleasant, courteous and helpful manner.				
( ) 187.	Demonstrate knowledge of style and format of letters, reports, and memoranda.				
( ) 188.	Demonstrate knowledge of the importance of appearance, accuracy, relevance, timeliness, and readability of letters and reports.				
( ) 189.	Compose letters and prepare reports that possess unity, conciseness, emphasis, clarify, and proper tone.				
( ) 190.	Compose and type in mailable form an answer to a given piece of business correspondence, in a clear, concise, and courteous manner applying correct English usage.				
( ) 191.	Choose from sentences or paragraphs the one in each case which best exhibits effective business communication for answers to specific correspondence.				
P.	**DUPLICATING PROCESSES**				
( ) 192.	Prepare, correctly proofread, and run a specified number of copies of high-quality duplicated copy, showing efficient operation of each type of duplicating equipment which is available in the classroom. The finished copy should be free of smudges, clear, and correctly centered.				
( ) 193.	Identify the appropriate duplicating process for a particular job when given an office assignment for the reproduction of material.				
( ) 194.	Demonstrate knowledge of principles of photocopying process.				
Q.	**FILING AND RECORDS MANAGEMENT**				
( ) 195.	Possess working knowledge of alphabetic, numeric, geographic, and subject filing.				
( ) 196.	Possess knowledge of records management practices and procedures.				
( ) 197.	Illustrate knowledge of retrieval systems.				

		1	2	3	4
( ) 198.	Index, code, and arrange in alphabetical order 10 names from a given list in 15 minutes.				
( ) 199.	File accurately 70-90 pieces of correspondence in 20 minutes according to given filing system.				
( ) 200.	File accurately 50-80, 3" x 5" cards in 18 minutes according to a given filing system.				
	R. DATA PROCESSING				
( ) 201.	Knowledge of what data processing is and its importance to business operations.				
( ) 202.	Define the following basic terms in data processing: automatic data processing, card column, coding, data, field, input/output media, memory, program, and source document.				
( ) 203.	Summarize the difference between hardware and software.				
( ) 204.	Identify functions of data processing equipment common to the local business community.				
( ) 205.	List four data processing occupations and give one duty of each.				
	S. RECORD KEEPING				
( ) 206.	Keep a record of receipts and disbursements using a single-entry system for tax purposes.				
( ) 207.	Apply knowledge of banking, when given relevant information, by opening a checking account, writing checks, and preparing a bank reconciliation with 100% accuracy.				
( ) 208.	Prepare a sales slip, an invoice, and a monthly statement, when given relevant data.				
( ) 209.	Compute extensions and totals for an inventory record from given data.				
( ) 210.	Compute and prepare a payroll register for five employees based on a given information.				
( ) 211.	Demonstrate the ability to keep simple stock records.				
	T. SKILL TYPEWRITING				
( ) 212.	Type letters, memos, forms, reports, manuscripts and other business materials with correct placement and errors neatly corrected. Materials should be proofread with 100 percent accuracy.				
( ) 213.	Type a five-minute straight copy timed writing at 45-55 net words per minute with no more than three errors.				
( ) 214.	Arrange and type in mailable form, from given rough-draft data, a letter of average length, a meeting-agenda enclosure for the letter with two carbon copy notations and correctly addressed envelopes, allowing 45 minutes for completion.				
( ) 215.	Demonstrate proficiency in producing tabular reports from rough draft and typewritten copy.				
	U. HANDLING MAIL				
( ) 216.	List and define five special postal services, with 85 percent accuracy.				

		1	2	3	4
( ) 217.	List four duties of the office worker in handling incoming and outgoing mail.				
( ) 218.	Given a description of incoming mail, rate the priority order for employer to handle.				
	V. MACHINE TRANSCRIPTION				
( ) 219.	Employ good transcription techniques and English usage in the transcription of recorded minutes (200 words) of a business meeting.				
( ) 220.	Transcribe from machine three letters ranging from 100-125 words each in mailable form.				
	X. JOB APPLICATION				
( ) 221.	List four sources of job information and explain how each is used.				
( ) 222.	Given a "want ad," compose and type in mailable form a letter of application and data sheet according to given format.				
( ) 223.	Complete a job application form correctly and legibly.				
( ) 224.	State the minimum Federal Civil Service requirements for typewriting.				
( ) 225.	Through role-playing, demonstrate the ability to perform acceptably during a job interview.				
	Y. OFFICE ORIENTATION				
( ) 226.	Explain how the type and size of a business determines office organization.				
( ) 227.	Identify the purposes and functions of an office.				
( ) 228.	Analyze different kinds of office jobs available, giving entry-level requirements, advantages and disadvantages of each.				
	Z. SHORTHAND TRANSCRIPTION				
	A. Students having satisfactorily completed one year of shorthand prior to entering office occupations are, by the end of the course, able to:				
( ) 229.	Record three letters of approximately 125 words each dictated from unfamiliar previewed material at 60 words per minute, and to transcribe the letters at the typewriter in mailable form in 30 minutes.				
( ) 230.	Take dictation on unfamiliar previewed material at a minimum of 60 words per minute for three minutes or 70 words per minute for two minutes and transcribe on the typewriter in proper context and format with 95% accuracy, applying correct English mechanics.				
	B. Students completing the second year of shorthand while enrolled in office occupations are able to:				
( ) 231.	Record three letters of approximately 130 words each dictated from unfamiliar previewed material at 100 words per minute, and transcribe the letters on the typewriter in mailable form in 30 minutes.				
( ) 232.	Take office style dictation of 150 words and transcribe in usable form in 15 minutes.				

STATE ADOPTED TEXTBOOKS - 5-YEAR CONTRACT

BUSINESS AND OFFICE EDUCATION - GRADES 9-12

EFFECTIVE JULY 1, 1978

INTRODUCTION TO BUSINESS (General or Basic)

Harcourt Brace Jovanovich, Inc.

General Business: Concepts, Values, Skills, Lyon, 1976

South-Western Publishing Company

General Business for Economics Understanding, 11th Edition, DeBrum, 1976

Prentice-Hall, Inc.

General Business and Economic Understandings, 4th Edition, Nanassy, 1973

BUSINESS MATHEMATICS

South-Western Publishing Company

Applied Business Mathematics, 10th Edition, Fairbank, 1975

Addison-Wesley Publishing Company

Business and Consumer Mathematics, 2nd Edition, Saake, 1977

Prentice-Hall, Inc.

Mathematics of Business, 2nd Edition, Diamond, 1975

TYPEWRITING (Occupational & Non-Occupational)

South-Western Publishing Company

Century 21 Typewriting, Complete Course, 2nd Edition, Lessenberry, 1977

McGraw-Hill Book Company (Gregg Division)

Typing I, General Course, Rowe, 1977
Typing 300, Volume 2, Vocational Course, Rowe, 1973

South-Western Publishing Company

Personal Typewriting for Junior High Schools, 3rd Edition, Wanous, 1971
Personal and Professional Typing, 4th Edition, Wanous, 1973

SHORTHAND

McGraw-Hill Book Company (Gregg Division)

Gregg Series 90
Gregg Shorthand, Gregg, 1978
Gregg Shorthand, Functional Method, Leslie, 1978
Gregg Speed Building, Gregg, 1978
Gregg Dictation, Leslie
Gregg Transcription, Leslie

South-Western Publishing Company

Century 21 Shorthand: Theory and Practice, Christensen, 1974
Century 21 Shorthand: Intensive Dictation/Transcription, Haggblade, 1974
Century 21 Shorthand: Advanced Dictation/Transcription, Stoddan, 1975

ACCOUNTING

South-Western Publishing Company

Century 21 Accounting, 1st Year Course, 2nd Edition, Boynton, 1977
Century 21 Accounting, Advance Course, Boynton, 1978

Prentice-Hall, Inc.

Accounting Principles, Thacker, 1976

Laidlaw Brothers

Modern Bookkeeping and Accounting, 2nd Edition, Miller, 1973

RECORDKEEPING

South-Western Publishing Company

Practical Record Keeping Course I, 4th Edition, Baron, 1975
Clerical Record Keeping Course II, 2nd Edition, Baron, 1977

McGraw-Hill Book Company (Gregg Division)

General Recordkeeping, 7th Edition, Huffman, 1976

BUSINESS ECONOMICS

South-Western Publishing Company

Consumer Economic Problems, 9th Edition, Warmke, 1977
Economics - Principles and Applications, 8th Edition, Kennedy, 1972

McGraw-Hill Book Company (Gregg Division)

The American Consumer: Issues and Decisions, Jelley, 1973

BUSINESS LAW

South-Western Publishing Company

Applied Business Law, 10th Edition, Fisk, 1977

Prentice-Hall, Inc.

Business Law, 5th Edition, Gatz, 1977

BUSINESS COMMUNICATIONS

Prentice-Hall, Inc.

Business English in Communications, 3rd Edition, Himstreet, 1975

South-Western Publishing Company

Effective English for Business Communication, 6th Edition, Aurner, 1970

BUSINESS MANAGEMENT

South-Western Publishing Company

Business Principles and Management, 6th Edition, Shilt, 1973

Random House, Inc.

Business Today, Rachman, 1976

BUSINESS MACHINES - OFFICE PROCEDURES - OFFICE OCCUPATIONS

South-Western Publishing Company

Office Machines Course, 4th Edition, Cornelia (Paper), 1971
Electronic and Mechanical Printing Calculator Course, Pasewark, (Paper), 1974
Duplicating Machine Processes, 2nd Edition, Pasewark (Paper), 1975
Ten-Key Adding-Listing Machine Course, 4th Edition, Pasewark (Paper), 1973
Electronic Display Calculator Course, Pasewark (Paper), 1975
Secretarial Office Procedures, 9th Edition, Meehan, 1977
Clerical Office Procedures, 6th Edition, Meehan, 1978
Business Filing and Records Control, 4th Edition, Bassett, 1974

McGraw-Hill Book Comapny (Gregg Division)

Applied Secretarial Procedures, 7th Edition, Fries, 1974

INTRODUCTION TO DATA PROCESSING AND COMPUTER SCIENCE

South-Western Publishing Company

Fundamentals of Data Processing, Wanous, 1971
Keypunch Training Course, 3rd Edition, Bux (Paper), 1975

Science Research Associates

Principles of Business Data Processing, 2nd Edition, Dock, 1974

Prentice-Hall, Inc.

Introduction to the Computer: The Tool of Business, Fuori, 1977
Business Data Processing, 4th Edition, Awad, 1975

Delmar Publishers

Elements of Computer Programming: Fortran, Marxer (Paper), 1973
Computer Programming with Cobol, Marxer (Paper), 1974

CHAPTER IV

CURRICULUM ADVISORY COMMITTEES AND STUDENT ORGANIZATIONS

ADVISORY COMMITTEES

As in any community college or technical institute program, the success of the secretarial science program depends significantly on the formal and informal support of advisory committees. Therefore, when a community college or technical institute considers the possibility of initiating a secretarial or office program, the chief administrator should appoint the advisory committee to assist in its development.[1]

The committee should consist of representatives from business and office related fields; educators from business and office education in the community, area or state. Committee members should be appointed on a rotating basis so that the committee duty will not become a burden to any individual member. Rotating membership will also give other interested people an opportunity to serve. The average committee usually consists of twelve to twenty representatives.

The secretarial science advisory committee will not only provide support for the secretarial and office program but should be able to provide assistance and information to business department coordinators and secretarial and office coordinators concerning job opportunities, curriculum, equipment and facilities. The committee could also provide assistance in the selection of students and instructors. The duties and responsibilities of the committee should be clearly stated and understood so that maximum service can be rendered. The committee should act in a consultative capacity and should be responsible for making recommendations and suggestions to the individual(s) within the institution who can act upon the advice offered.

The North Carolina Department of Community Colleges, Program Development Division, has a publication, Organization, Function and Operation of Advisory Groups, which gives detailed suggestions for the organization, function and operation of advisory committees. Other information about advisory committees can be obtained from the American Vocational Association and the American Association of Junior Colleges, Washington, D.C.

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[1]Albert J. Rindeau. The Role of the Advisory Committee in Occupational Education in the Junior College. Washington, D.C.: American Association of Junior Colleges, 1967.

STUDENT LEADERSHIP ORGANIZATIONS

Student leadership organizations provide meaningful learning experiences for students through the opportunity to conceive, plan, coordinate and implement a total project. Students are placed in roles where they can demonstrate initiative and the capacity for decision-making talents. Some of the student organizations available to students in office occupations programs are described below.

FUTURE BUSINESS LEADERS OF AMERICA -

PHI BETA LAMBDA, INC.

The Future Business Leaders of America (FBLA) - Phi Beta Lambda (PBL), Inc. is a nonprofit, student, vocational education organization. The plan of organization includes local chapters of FBLA in high schools; local chapters of PBL in business schools, technical institutes, community colleges, colleges and universities; state chapters and the FBLA-PBL national organization.

PBL is designed to serve young adults enrolled in business programs and to be an extension of the instructional program. The specific purposes are to:

1. Develop competent, aggressive business leadership
2. Strengthen the confidence of students in themselves and in their work
3. Create more interest in and understanding of American business enterprise
4. Encourage members in the development of individual projects which contribute to the improvement of home, business and community
5. Develop character, prepare for useful citizenship and foster patriotism
6. Encourage and practice efficient money management
7. Encourage scholarship and promote school loyalty
8. Assist students in the establishment of occupational goals
9. Facilitate the transition from school to work

Additional information on PBL can be obtained by calling or writing:

FBLA-PBL State Chairperson
Business and Office Education
Department of Public Instruction
Raleigh, NC 27611
(919) 733-7985

Director of Student Personnel Serv.
Department of Community Colleges
170 Education Building
Raleigh, NC 27611
(919) 733-3345

FUTURE SECRETARIES ASSOCIATION

The Future Secretaries Association (FSA) is directed by the National Secretaries Association (International) (NSA). The primary objectives of FSA are:

1. To stimulate interest in the secretarial profession
2. To develop a better understanding of secretarial responsibilities
3. To provide a basis for better secretaries of the future

Membership is open to students enrolled for a minimum of one year in a secretarial course of study in public or parochial high schools, accredited junior or community colleges/technical institutes, four-year colleges or universities or business schools. Members should have an interest in the secretarial field, unquestionable character and integrity and above average scholarship.

For additional information, call or write your local chapter or the state chapter of NSA or:

Future Secretaries Association Department
The National Secretaries Association (International)
616 East 63 Street
Kansas City, MO 64110

OFFICE EDUCATION ASSOCIATION

Office Education Association (OEA) was established in 1966 as an independent youth organization for students enrolled in high school and postsecondary office occupations education programs. OEA is a co-curricular activity designed as an integral part of the educational program to develop leadership abilities, interest in the American business system and competency in office occupations.

The major purposes of OEA are to:

1. Develop student leadership
2. Improve poise, sociability, attitude and tact
3. Develop vocational competence in office occupations
4. Promote better understanding of office education programs, people and activities at local, state and national levels
5. Teach effective planning
6. Develop enthusiasm for learning and for remaining knowledgeable in the office field
7. Develop confidence and a spirit of competition
8. Foster learning to get along with others
9. Develop loyalty
10. Develop understanding and promotion of the business world

For additional information, assistance in organizing a club and material write:

Office Education Association
1120 Morse Road
Columbus, OH 43229

CHAPTER V

FACULTY AND STAFF SELECTION

EDUCATIONAL QUALIFICATIONS

Formal qualification of faculty members by the Department of Community Colleges is not required. However, the State Board of Education and the Department do recommend that faculty members possess knowledge of the nature and role of the Community College System and the comprehensive institution(s), the ability to work with the students attending the institution(s) and the willingness to innovate and/or be flexible to meet the needs of the student(s) and community.

The North Carolina Administration Code; Title 16, Department of Public Education; Chapter 4, Department of Community Colleges; Subchapter 4C, Section .0202 provides additional information on faculty. Section .0202 of the Administration Code, page 4-21 states in part:

(1) . . . . . .

(2) Institutions shall employ faculty members so as to meet Southern Association of Colleges and Schools standards.

(3) All academic subject faculty will be required to hold the master's degree with a major in the subject field assigned.

(4) In technical fields, the teaching faculty should hold professional degrees of the bachelor's degree or beyond and appropriate work experience in the specialty or subject field assigned. In vocational fields, successful work experience is of great importance. In these fields, work experience may be weighed in considering the "equivalent" provisions of the standards.

The Board and the Department also adhere to Standard Five of the Southern Association of Colleges and Schools which discusses the selection, competence, growth, teaching loads, promotions, etc. of a faculty. (Refer to Standards of the College Delegate Assembly of the Southern Association of Colleges and Schools, December 10, 1975, pp. 13-17.)

SECRETARIAL AND OFFICE QUALIFICATIONS

The effectiveness of any program depends largely upon the competence and enthusiasm of the instructional staff. The technical competence, and change occuring in office occupations necessitates that instructors in secretarial science demonstrate special competence based both on proficiency in technical subject matter and on industrial or business experience.

Secretarial science instructors should be reasonably well-informed of the requirements in secretarial and office practice so they can utilize resource people, field examples and illustrations as supporting material in their courses. The number of and qualifications for each faculty member should be sufficient to implement the curriculum design and to accomplish the objective(s) of the program.

FACULTY WORK LOADS

The teaching load of the secretarial science instructor should be consistent with the teaching load of other instructors in other curriculum areas in the institution. Factors to be considered in making load determination should include: (1) class contact hours, (2) number of preparations, (3) student loads, (4) committee assignments, (5) departmental responsibilities and (6) other special duties. A full time load is usually considered to be from 12 to 25 contact hours per week.

PROFESSIONAL ASSOCIATIONS

Membership in and participation in professional associations will enable the secretarial science instructor through conferences and literature, to keep abreast of current research, industrial and occupational job competencies and new methodology and teaching procedures.

The professional business education associations of particular interest to secretarial science instructors and propsective instructors include:

National Business Education Association. This is the only national organization with total concern for, and interest in, business education and business teachers. NBEA conducts an annual national convention, publishes the Business Education Forum and the National Business Education Yearbook, and provides other services and materials for business teachers. The four divisions of NBEA are (1) International, (2) Research, (3) Teacher Education (NAVTE) and (4) Teaching, Supervision and Administration.

Southern Business Education Association. This is one of the five regional associations of the National Business Education Association. North Carolina business educators who belong to NBEA also are members of SBEA, which holds an annual convention and publishes newsletters and service bulletins.

North Carolina Business Education Association. The state business education association has membership open to all business educators and college students enrolled in business teacher education programs. NCBEA holds an annual meeting and publishes a news bulletin.

North Carolina Community College Association of Business Chairmen and Department Heads. The purpose of this organization is to improve the quality of business education provided by the member institutions of the North Carolina Community College system; with accompanying benefits to students, instructors, administrators and the State. This purpose is to be accomplished by the organization's developing and sharing successful and promising business education practices as well as professional information necessary to maintain and promote effective business programs. Membership includes those persons from community colleges/technical institutes responsible for directing and/or supervising business programs. Associate memberships are extended to any individual whose interest and support would be beneficial to the growth and development of business programs; qualification is approved by officers of the Association.

American Vocational Association. This is the national organization for all vocational teachers and administrators. The Business and Office Education Division has a representative on the AVA Executive Board. AVA holds an annual convention and publishes the American Vocational Journal monthly.

North Carolina Vocational Association. The membership of this state vocational association is comprised of teachers, teacher educators and administrators associated with vocational education programs. The Business and Office Education Division has a representative on the NCVA Executive Board.

Honorary Societies

Pi Omega Pi. This is an honor society in business education which promotes scholarship and a professional spirit at the undergraduate level. Membership is open by invitation to business education students in universities and colleges where active chapters are located.

Delta Pi Epsilon. This honorary graduate business education fraternity, with its invitational membership, promotes research in business education and publishes the Delta Pi Epsilon Journal as well as other occasional pronouncements.

SUMMARY

As indicated earlier, the successful operation of the secretarial science program or any program within an institution depends to a great extent on the selection, continuous development and satisfactory retention of a faculty member. The faculty member should be able to carry out the objectives of the secretarial science program and to plan, implement and evaluate learning experiences essential to the program. The faculty member should also be able to counsel students, work with individuals and organizations within the community and, through research, continuing education and/or professional organizations be aware of the changes in office employment.

CHAPTER VI

FACILITIES, EQUIPMENT AND INSTRUCTIONAL AIDS

FACILITIES

The community college or technical institute is responsible for providing adequate and attractive facilities which are appropriately located for instruction. The number and size of classrooms will depend upon student enrollment, whether or not the classrooms will be used for students in other programs, curriculum design, methods and media utilized in instruction. Classrooms should be properly lighted, ventilated, heated, air-conditioned and acoustic-proof. Chalkboards and electrical outlets should be located for convenience in audiovisual communication. The classroom should also be equipped with blackout shades or their equivalent for convenience in using audiovisual equipment.

At least one laboratory-classroom with equipment for demonstration and laboratory practice is needed. Additional laboratory space may be needed if simulation is used in the program. The room(s) should be available for student practice at other times other than formal laboratory periods. Suggested laboratories include: skills laboratory, multipurpose laboratory, secretarial laboratory, typewriting laboratory, business machines laboratory and simulation laboratory.

EQUIPMENT

The amount and kind of equipment needed for the secretarial science program will depend on the instructional process utilized by each instructor in a course. Equipment lists providing a listing of laboratory equipment, are listed below and shown in Appendix D.

129 Office Machines Laboratory
159 Secretarial Science Laboratory
180 Typing Laboratory

TEXTBOOKS, REFERENCES AND VISUAL AIDS

Textbooks, references and visual aids for teaching any subject area must be reviewed constantly and updated or supplemented based on new knowledge in the field and the results of research in teaching methods and developing concepts.

The textbooks, references and visual aids for the suggested secretarial science program have been carefully reviewed and selected by writers of the course outlines. From the lists presented, it should be possible to select materials that are appropriate for each institution - with the understanding that unlisted materials may also be appropriate. From these lists, the instructor should select materials that meet stated teaching objectives, and should carefully preview and study materials before they are used.

Preparation of any course in the curriculum requires the instructor to become familiar with texts and references in the course outlines and with others that may be available. By using these techniques the instructor will then be able to select materials that best meet the particular needs of the student and that will best promote an interesting, high-level technical presentation to the student.

THE LIBRARY

Part of the strength of any program is indicated by the quality of its library. Characteristics of a quality library include qualifications of the librarian; the facilities; the quality, quantity and relevancy of content and the staffing and organization. Library facilities should be readily accessible to both full-time and part-time students and faculty not only during instructional hours but for hours beyond regular instructional hours. The library should contain up-to-date books, periodicals and other reference materials related to the secretarial science program.

Secretarial science instructors and students should be involved in selecting materials for the library and/or approving reference materials for secretarial and office and related courses.

Students should learn to use the library; therefore, instruction should involve the students in library work, both to develop the habit of using the library as a learning tool and to help foster a professional attitude which regards libraries as a resource for research endeavors.

PROFESSIONAL BOARDS AND ASSOCIATIONS

Secretarial science boards and associations are an important source of instructional materials and other benefits for faculty members and students. Such associations provide information on publications, reports, new concepts, processes, techniques and equipment available in the business and office field.

These associations can also provide support in investigating the need for a program, in promoting the program, in providing work experience for students and in placement of graduates.

Boards and associations may also supply resource people to speak to classes, to host student groups on field trips or for individual student projects.

Instructors should be encouraged to work closely with these boards and associations and to become active or ad hoc members if possible. Membership will enable them to learn quickly of developments in the industry and to become acquainted with persons in the community who are most active in the field.

Early in their studies, students should become aware of these boards and associations and the resources they offer. They should also be encouraged to join those who offer affiliate memberships.

Some of these boards and associations include:

1. National Secretaries Association (International) (North Carolina local and state and national chapters)

2. North Carolina Association of Educational Office Personnel (Consists of local school board, community college/technical institute and university office personnel)

3. North Carolina Commission on the Status of Women (state and some local county commissions)

CHAPTER VII

SECRETARIAL AND GENERAL OFFICE CURRICULUMS

ORGANIZATION OF CHAPTER

Advisory Committees. The secretarial and general office curriculums and course information in this chapter were approved by the North Carolina Department of Community Colleges' Secretarial Science Advisory Committee and Curriculum Committee.

The course syllabi in Volumes II and III describe information that business and office employees and employers and educators suggested as concepts and materials that should be included and discussed in each secretarial/general office course and curriculum.

Purposes and Need. The first part of this chapter describes the purposes and need for a secretarial science program followed by a curriculum design, curriculum standards and a listing and discussion of NOBELS competencies.

Competencies. Competencies required for this curriculum are listed by subject area. Completion of this curriculum should assure that graduates have the basic knowledge or understanding, skill and/or attitude needed for secretarial and general office employment.

Syllabi and Abstracts. Only the syllabi related specifically to the secretarial science field are included in Volumes II and III. Abstracts of related and general education courses are included in Volume II. Course descriptions are included in the syllabus or abstract.

NOBELS. NOBELS has been integrated in secretarial and office courses when appropriate. A listing of the NOBELS competencies are included in this chapter with analysis as to number needed for specific jobs, ones for a particular job and ones common to all jobs. Additional competencies may be added to the syllabi, if wanted or needed.

Bibliography. The bibliography in each syllabus is divided into four sections: books, periodicals, audiovisual aids and other sources.

INTRODUCTION

Based on a manpower projection report published by the Employment Security Commission of North Carolina, an estimated 544,000 new job opportunities will be created from 1974 to 1985 through industrial expansion and replacement. Total job opportunities for the business and office occupational group (referred to as clerical and kindered) will be 221,720. This group of workers has been one of the leading occupational groups increasing in proportion to total employment year after year. This same trend has also been true nationwide.

The rate of growth in business and office occupations is the result of more paper work, more technological changes and an increasing demand from management for more information from more sources about more items. Nearly every organization employs office workers. The workers need to be trained and in many cases retrained to meet technological advances.

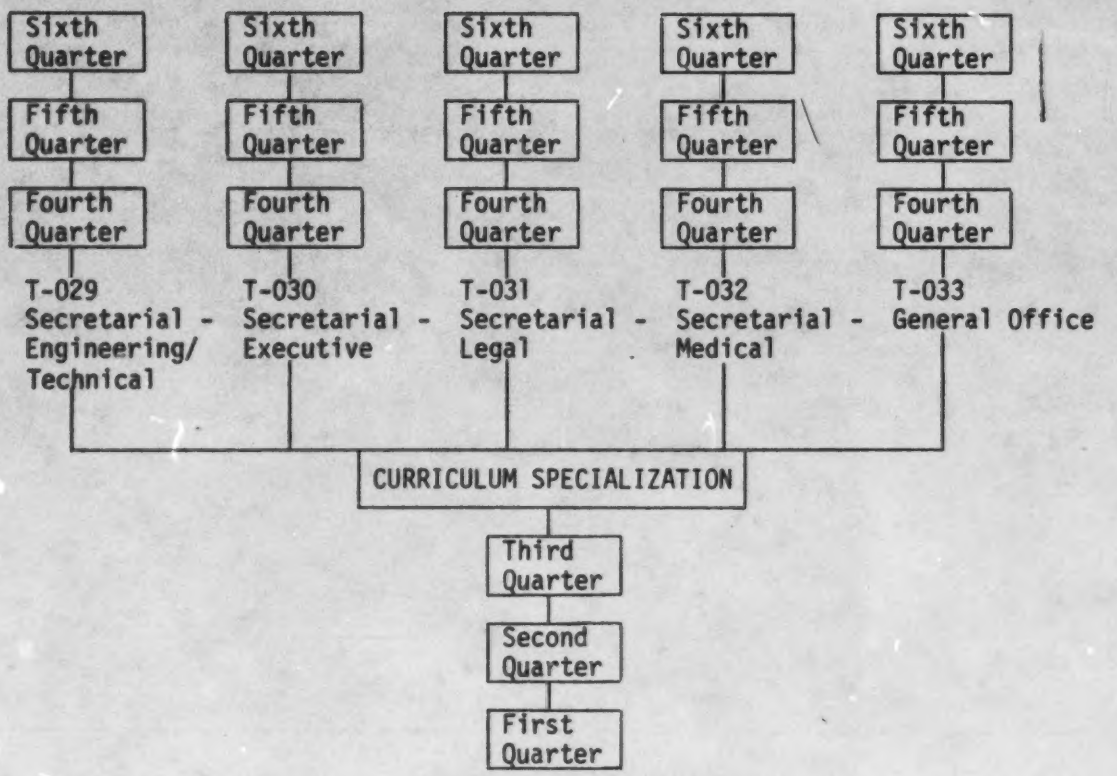
The demand for good office workers far exceeds the supply; therefore, business and office educators should balance their efforts and discover the requirements and qualifications needed to educationally prepare office workers for the jobs available.

CURRICULUM DESIGN

The Secretarial Science curriculum cluster is designed with a common core of courses for the first three quarters and specialized courses for the last three quarters. Each of the five curriculums shown is designed as a separate curriculum and is assigned a separate curriculum code. An institution may wish to implement one or a combination of the curriculums included; however, each curriculum offered must be approved by the State Board of Education.

Institutions using the seven quarter system could elect to have four quarters of core courses and three quarters of specialized courses. The seven quarter system should not include additional credit hour degree requirements but should allow a longer time frame for the student to complete degree requirements.

CURRICULUM DESIGN



Curriculum Standards

STATE BOARD OF EDUCATION
NORTH CAROLINA DEPARTMENT OF COMMUNITY COLLEGES
RALEIGH, NORTH CAROLINA

PROGRAM AREA

Business Occupations

CURRICULUM CODE & TITLE

T-029 Secretarial - Engineering and Technical

CURRICULUM DESCRIPTION

The purposes of the Engineering and Technical Secretarial curriculum are to:

Prepare the individual to enter the secretarial profession in firms concerned with research, development and production.

Provide an educational program for individuals wanting education for upgrading (moving from one scientific secretarial position to another) or retraining (moving from present position to a scientific secretarial position).

Provide an opportunity for individuals wanting to fulfill professional or general interest needs.

These purposes will be fulfilled through skill development in the areas of typewriting, shorthand, transcription and office machines operation and through knowledge of the scientific method, the need for scientific accuracy and a technical vocabulary. Through these skills the individual will be able to perform office-related activities and through the development of personal competencies and qualities will be provided the opportunity to enter the engineering or technical secretarial profession.

JOB OPPORTUNITIES

Entry-Level	Advanced-Level
Secretary	Administrative Secretary
Stenographer	

CURRICULUM STANDARDS

STATE BOARD OF EDUCATION APPROVAL _____	MINIMUM/MAXIMUM RANGE OF QUARTER HOUR CREDITS			
	Technical	Technical Specialty	Vocational	Vocational Specialty
TECHNICAL/VOCATIONAL (MAJOR)	40-74			
Dictation Blueprint Reading Verbal Machine Shorthand Theory Word Processing Machines Management or Supervision Filing Terminology/Vocabulary Typewriting				
RELATED	20-31			
Accounting Data Processing Systems Economics Introductory Business Law Mathematics				
GENERAL EDUCATION	18			
English Psychology Sociology Social Science				
ELECTIVES	0			
COOPERATIVE EDUCATION/INTERNSHIP	3-6			
RANGE OF QUARTER HOUR CREDITS				
MIN.	109			
MAX.	119			
MINIMUM PERCENTAGE OF QHC AWARDED ON 1:1 (CLASSWORK) RATIO	75%			
APPROVED FOR AWARDING	AAS			

Curriculum Standards

STATE BOARD OF EDUCATION
NORTH CAROLINA DEPARTMENT OF COMMUNITY COLLEGES
RALEIGH, NORTH CAROLINA

PROGRAM AREA

Business Occupations

CURRICULUM CODE & TITLE

T-030 Secretarial - Executive

CURRICULUM DESCRIPTION

The purposes of the Executive Secretarial curriculum are to:

Prepare the individual to enter the secretarial profession.

Provide an educational program for individuals wanting education for upgrading (moving from one secretarial position to another) or retraining (moving from present position to secretarial position).

Provide an opportunity for individuals wanting to fulfill professional or general interest needs.

These purposes will be fulfilled through skill development in the areas of typewriting, shorthand, transcription and office machines operation. Through these skills the individual will be able to perform office-related activities and through the development of personal competencies and qualities will be provided the opportunity to enter the secretarial profession.

JOB OPPORTUNITIES

Entry-Level		Advanced Level
Secretary	Posting Clerk	Administrative Secretary
Stenographer	Administrative Clerk	Transcribing Operator Supervisor
Social Secretary	Correspondence Clerk	File Clerk II
Data Typist	Appointment Clerk	Billing Typist (Billing Clerk II)
Typist	Receptionist	
Automatic Typewriter Operator	Personnel Clerk	
Payroll Clerk		
File Clerk I		
Accounting Clerk		

CURRICULUM STANDARDS

STATE BOARD OF EDUCATION APPROVAL _____

	MINIMUM/MAXIMUM RANGE OF QUARTER HOUR CREDITS			
	Technical	Technical Specialty	Vocational	Vocational Specialty
TECHNICAL/VOCATIONAL (MAJOR)	37-71			
Dictation				
Verbal				
Machine				
Shorthand Theory				
Word Processing				
Machines				
Management or Supervision				
Filing				
Terminology/Vocabulary				
Typewriting				
RELATED	20-31			
Accounting				
Data Processing Systems				
Economics				
Introductory Business				
Law				
Mathematics				
GENERAL EDUCATION	18			
English				
Psychology				
Sociology				
Social Science				
ELECTIVES	0-3			
COOPERATIVE EDUCATION/INTERNSHIP	3-6			
RANGE OF QUARTER HOUR CREDITS				
MIN.	109			
MAX.	119			
MINIMUM PERCENTAGE OF QHC AWARDED ON 1:1 (CLASSWORK) RATIO	75%			
APPROVED FOR AWARDING	AAS			

Curriculum Standards

STATE BOARD OF EDUCATION
NORTH CAROLINA DEPARTMENT OF COMMUNITY COLLEGES
RALEIGH, NORTH CAROLINA

PROGRAM AREA

Business Occupations

CURRICULUM CODE & TITLE

T-031 Secretarial - Legal

CURRICULUM DESCRIPTION

The purposes of the Legal Secretarial curriculum are to:

Prepare the individual to enter the legal secretarial profession through work in a lawyer's office in city, county, state or government offices.

Provide an educational program for individuals wanting education for upgrading (moving from one legal secretarial position to another) or retraining (moving from present position to legal secretarial position).

Provide an opportunity for individuals wanting to fulfill professional or general interest needs.

These purposes will be fulfilled through skill development in the areas of legal typewriting, shorthand transcription and machines operation. Through these skills the individual will be able to perform legal, office-related activities and through the development of personal competencies and qualities will be provided the opportunity to enter the legal secretarial profession.

JOB OPPORTUNITIES

Entry-Level		Advanced Level
Secretary	Posting Clerk	Administrative Secretary
Legal Secretary	Administrative Clerk	Transcribing Operator Supervisor
Stenographer	Correspondence Clerk	File Clerk II
Typist	Appointment Clerk	Billing Typist (Billing Clerk II)
Automatic Typewriter Operator	Receptionist	
Payroll Clerk	Personnel Clerk	
File Clerk I		
Accounting Clerk		

CURRICULUM STANDARDS

STATE BOARD OF EDUCATION APPROVAL	MINIMUM/MAXIMUM RANGE OF QUARTER HOUR CREDITS			
	Technical	Technical Specialty	Vocational	Vocational Specialty
TECHNICAL/VOCATIONAL (MAJOR)	40-74			
Dictation Verbal Machine Shorthand Theory Word Processing Machines Management or Supervision Filing Terminology/Vocabulary Typewriting				
Criminal Justice Criminal Law Due Process				
RELATED	20-31			
Accounting Data Processing Systems Economics Introductory Business Law Mathematics				
GENERAL EDUCATION	18			
English Psychology Sociology Social Science				
ELECTIVES	0			
COOPERATIVE EDUCATION/INTERNSHIP	3-6			
RANGE OF QUARTER HOUR CREDITS				
MIN.	109			
MAX.	119			
MINIMUM PERCENTAGE OF QHC AWARDED ON 1:1 (CLASSWORK) RATIO	75%			
APPROVED FOR AWARDING	AAS			

Curriculum Standards

STATE BOARD OF EDUCATION
NORTH CAROLINA DEPARTMENT OF COMMUNITY COLLEGES
RALEIGH, NORTH CAROLINA

PROGRAM AREA Business Occupations

CURRICULUM CODE & TITLE T-032 Secretarial - Medical

CURRICULUM DESCRIPTION

The purposes of the Medical Secretarial curriculum are to:

Prepare the individual to enter the medical secretarial profession through work in a doctor's office in city, county, state or government offices.

Provide an educational program for individuals wanting education for upgrading (moving from one medical position to another) or retraining (moving from present position to medical secretarial position).

Provide an opportunity for individuals wanting to fulfill professional or general interest needs.

These purposes will be fulfilled through skill development in the areas of medical typewriting, shorthand transcription and machines operation. Through these skills the individual will be able to perform medical, office-related activities and through the development of personal competencies and qualities will be provided the opportunity to enter the medical secretarial profession.

JOB OPPORTUNITIES

Entry-Level		Advanced Level
Secretary	Posting Clerk	Administrative Secretary
Medical Secretary	Administrative Clerk	Transcribing Operator Supervisor
Stenographer	Correspondence Clerk	File Clerk II
Typist	Appointment Clerk	Billing Typist (Billing Clerk II)
Automatic Typewriter Operator	Receptionist	
Payroll Clerk	Personnel Clerk	
File Clerk I		
Accounting Clerk		

CURRICULUM STANDARDS

STATE BOARD OF EDUCATION APPROVAL _____

	MINIMUM/MAXIMUM RANGE OF QUARTER HOUR CREDITS			
	Technical	Technical Specialty	Vocational	Vocational Specialty
TECHNICAL/VOCATIONAL (MAJOR)	40-74			
Dictation Verbal Machine Shorthand Theory Word Processing Machines Management or Supervision Filing Terminology/Vocabulary Typewriting				
Human Anatomy or Basic Science Medical Law, Ethics				
RELATED	20-31			
Accounting Data Processing Systems Economics Introductory Business Law Mathematics				
GENERAL EDUCATION	18			
English Psychology Sociology Social Science				
ELECTIVES	0			
COOPERATIVE EDUCATION/INTERNSHIP	3-6			
RANGE OF QUARTER HOUR CREDITS				
MIN.	109			
MAX.	119			
MINIMUM PERCENTAGE OF QHC AWARDED ON 1:1 (CLASSWORK) RATIO	75%			
APPROVED FOR AWARDING	AAS			

Curriculum Standards

STATE BOARD OF EDUCATION
NORTH CAROLINA DEPARTMENT OF COMMUNITY COLLEGES
RALEIGH, NORTH CAROLINA

PROGRAM AREA

Business Occupations

CURRICULUM CODE & TITLE

T-033 General Office Technology

CURRICULUM DESCRIPTION

The purposes of the General Office curriculum are to:

Prepare the individual to enter clerical-office occupations.

Provide an educational program for individuals wanting education for upgrading (moving from one position to another) or retraining (moving from present position to a clerical position).

Provide an opportunity for individuals wanting to fulfill professional or general interest needs.

These purposes will be fulfilled through skill development in the areas of typewriting, filing and office machines operation. Through these skills and through development of personal competencies and qualities, the individual will be able to function effectively in office-related activities.

JOB OPPORTUNITIES

Entry-Level		Advanced-Level
Machine Operators	Typist	Transcribing Machine Operator Supervisor
Adding	Payroll Clerk	Duplicating Machine Operator III
Calculating	File Clerk I	Automatic Typewriter Operator
Keypunch	General Office Clerk	File Clerk II
Transcribing	Posting Clerk	Billing Typist (Billing Clerk II)
Duplicating	General Clerk	Accounting Clerk
Offset-Duplicating	Appointment Clerk	Correspondence Clerk
Data Typist	Receptionist	Administrative Clerk
Clerk-Typist		Personnel Clerk

CURRICULUM STANDARDS

STATE BOARD OF EDUCATION APPROVAL _____

	MINIMUM/MAXIMUM RANGE OF QUARTER HOUR CREDITS			
	Technical	Technical Specialty	Vocational	Vocational Specialty
TECHNICAL/VOCATIONAL (MAJOR)	39-68			
Dictation Machine Word Processing (Introductory) Machines Management or Supervision Filing Terminology/Vocabulary Typewriting				
RELATED	20-31			
Accounting Data Processing Systems Economics Introductory Business Law Mathematics				
GENERAL EDUCATION	18			
English Psychology Sociology Social Science				
ELECTIVES	3-5			
COOPERATIVE EDUCATION/INTERNSHIP	3-6			
RANGE OF QUARTER HOUR CREDITS				
MIN.	100			
MAX.	110			
MINIMUM PERCENTAGE OF QHC AWARDED ON 1:1 (CLASSWORK) RATIO	75%			
APPROVED FOR AWARDING	AAS			

COMPETENCY-BASED MODEL

Data for the competency-based model and the course syllabi are based on information from the literature and from work completed by the 1975-76 North Carolina Community College Secretarial Science Curriculum Advisory Committee and the 1976-77 Secretarial Science Competency-Based Project Committee.

TASK ANALYSIS

Research on task analysis of office workers has been limited. In a 1972 report entitled, Business Education for the Emergent Office, Huffman and Gust list high-priority abilities common to all levels of office workers:

1. Ability to comprehend and conceptualize the system of the organization or unit as a vast network or information flow and to understand as an employee one's position in the operation of the system.

2. Ability to adjust quickly to new equipment, procedures and work sequences brought about by rapid technological changes for the purpose of updating skills, increasing individual productive capacity and raising company output.

3. Ability to perform adequately in one system, switch to another system and perform adequately, and then switch back and perform adequately again (total job flexibility).

4. Ability to recognize how inaccurate data entering a system may affect outcomes on succeeding jobs.

5. Ability to gain rapport with all racial groups.

6. Ability to communicate via data communication devices and to know the limitations, methods of utilization and choose from available equipment for particular operations.

7. Ability to input data in an on-line, real-time system to obtain information for report preparation, office work production and exception reporting.

8. Ability to review information systems output to determine whether there are errors.

9. Ability to determine what happened to produce the results in an information system and to provide corrections of data, if needed.[1]

In 1971, Erickson reported on job components considered basic to most beginning and intermediate levels of office work in 300 office jobs:

1. 90 percent of the jobs involve communicating with others (interpersonal relations)
2. 71 percent of the jobs involve sorting, filing and retrieving
3. 49 percent of the jobs involve typewriting
4. 47 percent of the jobs involve checking, computing and verifying
5. 21 percent of the jobs involve collecting and describing
6. 18 percent of the jobs involve operating business machines
7. 14 percent of the jobs involve operating automatic data processing equipment
8. 10 percent of the jobs involve taking dictation
9. 3 percent of the jobs involve supervising, planning and training
10. 3 percent of the jobs involve analyzing procedures and flow-charting.[2]

PROBLEMS OF OFFICE WORKERS

Frazier, James and Lovern categorize problems of office workers as:

Weaknesses in Skills and Abilities

1. Grammar, punctuation, spelling and vocabulary
2. Proofreading
3. Following directions
4. Proper use of reference materials
5. Dictation and transcription abilities
6. Reading shorthand notes
7. Dictating

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[1]Harry Huffman and Dale D. Gust, Business Education for the Emergent Office (Columbus, Ohio: The Center for Vocational and Technical Education, The Ohio State University, June, 1970).

[2]Lawrence W. Erickson, Basic Components of Office Work--An Analysis of 300 Office Jobs, Monograph Number 123 (Cincinnati: South-Western Publishing Co., May, 1971), p. 31.

Weaknesses in Personal Traits

1. Grooming
2. Conscientiousness and interest in job
3. Maturity
4. Diction
5. Ability to accept criticism and suggestions
6. Self-confidence
7. Personal life interfering with job[3]

COMPETENCIES NEEDED BY OFFICE WORKERS

Competencies needed by office workers were identified in the NOBELS project and are included on pages 19-37. These competencies were analyzed by the Secretarial Science Curriculum and Advisory Committees and have been classified according to: (1) NOBELS competencies needed for specific jobs, Appendix C-2; (2) number of competencies needed by job category and title, pages 39-40 and (3) competencies common to all office occupations, pages 41-42. Other competencies identified by the Committees are listed by subject area (pages 43-48) followed by related and general education competencies. Additional NOBELS competencies may be added to the course syllabi in Volumes II and III, if wanted or needed.

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[3]Michael Moskovis and Ron C. DeYoung, "Contemporary Research in Secretarial Office Practice and Its Significance in the Classroom," Effective Secretarial Education, eds. Marion G. Coleman and Oleen M. Henson (Reston, Virginia: National Business Education Association, 1984), p. 225.

TECHNICAL COMPETENCIES
NOBELS LISTING AND ANALYSIS

COMPENDIUM BY CODE CLASSIFICATION
OF 373 TASK STATEMENTS

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01 The worker types invoices from such documents as sales tickets, contracts, and receiving reports. (59 task sheets, detail)

01.01.02 The worker records accounts receivables from such documents as salesmen's orders, cash receipts, and invoices. (48 task sheets, detail)

01.01.03 The worker prepares billings of sales. (41 task sheets, detail)

01.01.04 The worker writes delinquent customer. (27 task sheets, detail)

01.01.05 The worker verifies customer's account receivable. (18 task sheets, detail)

01.01.06 The worker completes medical charges for insurance reimbursement. (15 task sheets, detail)

01.01.07 The worker completes sales reports. (12 task sheets, detail)

01.01.08 The worker prepares statements from patient's accounts and charge slips. (8 task sheets, detail)

01.01.09 The worker calls delinquent customers. (4 task sheets, semi-detail)

01.01.10 The worker processes changes in status of account. (2 task sheets, semi-detail)

01.01.11 The worker requests payment from delinquent patients. (2 task sheets, semi-detail)

01.01.12 The worker processes follow-up records of patient's visit. (1 task sheet, semi-detail)

01.02. Accounts Payable

01.02.01 The worker computes accounts payables from source documents. (69 task sheets, detail)

01.02.02 The worker records accounts payables. (47 task sheets, detail)

01.02.03 The worker prepares payments from documents such as invoices, bills, and vouchers. (33 task sheets, detail)

01.03. Payroll

01.03.01 The worker prepares payroll. (73 task sheets, detail)

01.03.02 The worker records payroll information. (27 task sheets, detail)

01.03.03 The worker computes payroll changes. (17 task sheets, detail)

01.03.04 The worker compiles payroll reports from payroll sheets, time sheets, job cards, and printouts. (15 task sheets, detail)

01.03.05 The worker punches payroll data. (8 task sheets, semi-detail)

01.03.06 The worker records payroll changes for hospital employees. (2 task sheets, semi-detail)

01.03.07 The worker prepares a dummy payroll. (1 task sheet, semi-detail)

01.03.08 The worker computes salesmen's commission. (1 task sheet, semi-detail)

01.03.09 The worker prepares time cards. (1 task sheet, semi-detail)

01.03.10 The worker updates weekly payroll time cards. (1 task sheet, semi-detail)

01.03.11 The worker maintains records of time spent developing new products from weekly activity tickets. (1 task sheet, semi-detail)

01.03.12 The worker processes status time slips. (1 task sheet, semi-detail)

01.03.13 The worker compiles an employee transfer list from output cards. (1 task sheet, semi-detail)

01.04. Computing and Checking

01.04.01 The worker checks the accuracy of source documents such as sales, purchasing, tax reports, and forms. (28 task sheets, detail)

01.04.02 The worker verifies totals of cancelled checks, computer tapes, and tellers' balance sheets. (21 task sheets, detail)

01.04.03 The worker verifies cash receipts for deposit. (18 task sheets, detail)

01.04.04 The worker performs routine check on such items as deposit slips, adding machine tapes, and advices. (15 task sheets, detail)

01.04.05 The worker corrects checks, savings and withdrawal slips, balance sheets, and other source documents. (12 task sheets, detail)

01.04.06 The worker checks computations with proofing machine. (8 task sheets, detail)

01.04.07 The worker distributes daily cash to tellers in branch banks. (2 task sheets, semi-detail)

01.04.08 The worker sorts coins from the federal reserve bank daily. (2 task sheets, semi-detail)

01.04.09 The worker verifies installment loan balances. (1 task sheet, semi-detail)

01.04.10 The worker prepares night deposits. (1 task sheet, semi-detail)

01.04.11 The worker performs audit of particular functions in individual departments of the bank. (1 task sheet, semi-detail)

01.04.12 The worker codes transaction tax on tickets. (1 task sheet)

01.05. Receipts

01.05.01 The worker prepares the bank deposit from cash receipts. (27 task sheets, detail)

01.05.02 The worker receives payments over the counter. (20 task sheets, detail)

01.05.03 The worker records payments received. (17 task sheets, detail)

01.05.04 The worker records payments for medical services. (16 task sheets, detail)

01.05.05 The worker records deposits to customer accounts. (12 task sheets, detail)

01.05.06 The worker prepares reconciliation of bank account. (8 task sheets, detail)

01.05.07 The worker processes money for library books and films from check-out requests and late and lost book notices. (3 task sheets, semi-detail)

01.05.08 The worker performs bookkeeping duties of a small bank. (1 task sheet, semi-detail)

01.06. Financial Entries

01.06.01 The worker records data for financial reports from schedules, license fee forms, and damage claims. (28 task sheets, detail)

01.06.02 The worker prepares financial reports. (26 task sheets, detail)

01.06.03 The worker records items such as stocks, bonds, deposit slips, and passbooks. (18 task sheets, detail)

01.06.04 The worker records receipts and withdrawals in the ledger. (13 task sheets, detail)

01.06.05 The worker records loan payment reversing entries. (1 task sheet, semi-detail)

01.06.06 The worker records monies received for or spent from internal accounts. (1 task sheet, semi-detail)

01.06.07 The worker adjusts property tax records from transfer forms. (1 task sheet, semi-detail)

01.07. Cost Accounting

01.07.01 The worker compiles unit costs of jobs and sales/production estimates from expense sheets and/or total sales figures. (33 task sheets, detail)

01.07.02 The worker prepares bids and cost estimates of products and services. (12 task sheets, semi-detail)

01.07.03 The worker compiles variance reports from actual and standard cost figures. (7 task sheets, semi-detail)

01.07.04 The worker types cost analysis reports. (4 task sheets, semi-detail)

01.07.05 The worker determines cost estimates by observing production and scanning blueprints. (2 task sheets, semi-detail)

01.07.06 The worker compiles relevant statistics and determines improvements in methods by submitting cost analysis of proposed changes. (2 task sheets)

01.07.07 The worker processes new accrual accounts from current cost analyses and additional specifications. (2 task sheets)

01.08. Credit

01.08.01 The worker processes credit applications. (17 task sheets, detail)

01.08.02 The worker verifies customer credit. (8 task sheets, detail)

01.08.03 The worker processes credit information. (8 task sheets, semi-detail)

01.08.04 The worker informs applicant and company department of approved/rejected credit applications. (7 task sheets, detail)

01.08.05 The worker processes credit memorandums. (5 task sheets, detail)

01.08.06 The worker processes credit information request. (3 task sheets, detail)

01.08.07 The worker answers charge account billing inquiries. (2 task sheets, semi-detail)

01.08.08 The worker updates delinquent account lists. (1 task sheet)

01.08.09 The worker determines extension of additional credit. (1 task sheet, semi-detail)

01.08.10 The worker compiles delinquent receipts report from a computer printout, amounts of paper sold, and cash receipts. (1 task sheet)

01.08.11 The worker verifies wire request of amount due a customer. (1 task sheet)

01.09. Disbursements

01.09.01 The worker prepares disbursements from customer accounts. (12 task sheets, semi-detail)

01.09.02 The worker prepares disbursement of funds. (11 task sheets, detail)

01.09.03 The worker prepares disbursement of petty cash funds. (4 task sheets, semi-detail)

02. INTERNAL SERVICES

02.01. Mailing

02.01.01 The worker processes departmental incoming mail. (99 task sheets, detail)

02.01.02 The worker prepares daily bulk mailings. (28 task sheets, semi-detail)

02.01.03 The worker sorts materials such as invoices, purchase orders, statements, checks, and contracts. (25 task sheets)

02.01.04 The worker processes company outgoing mail. (22 task sheets, semi-detail)

02.01.05 The worker performs mailroom duties. (19 task sheets, semi-detail)

02.01.06 The worker operates an addressing machine. (16 task sheets, semi-detail)

02.01.07 The worker delivers incoming and outgoing mail. (16 task sheets, semi-detail)

02.01.08 The worker delivers materials such as supplies, blueprints, and product samples. (12 task sheets, semi-detail)

02.01.09 The worker processes incoming mail such as bank forms and checks. (11 task sheets, detail)

02.01.10 The worker processes incoming hospital mail. (9 task sheets, detail)

02.01.11 The worker arranges routing of publications. (8 task sheets)

02.01.12 The worker delivers mail/account documents to the post office company branches. (7 task sheets)

02.01.13 The worker processes requests for standard product information. (6 task sheets)

02.01.14 The worker processes departmental outgoing mail. (6 task sheets, semi-detail)

02.01.15 The worker processes certified, special delivery, and registered mail. (6 task sheets, semi-detail)

02.01.16 The worker processes interoffice mail. (6 task sheets)

02.01.17 The worker packages items for mailing. (5 task sheets)

02.01.18 The worker attaches incoming mail to files for processing. (4 task sheets)

02.01.19 The worker checks envelopes for additional contents with scanner. (1 task sheet)

02.01.20 The worker delivers batches of transactions to the vault area. (1 task sheet)

02.02. Filing

02.02.01 The worker processes requests for records or files. (120 task sheets, detail)

02.02.02 The worker updates files. (43 task sheets, semi-detail)

02.02.03 The worker files materials such as legal, personnel, and purchasing documents. (41 task sheets, semi-detail)

02.02.04 The worker processes materials for filing such as legal, personnel, and real estate documents. (35 task sheets, semi-detail)

02.02.05 The worker arranges ledger cards for filing or further processing. (6 task sheets, semi-detail)

02.02.06 The worker updates the central index files. (4 task sheets, semi-detail)

02.03. Non-Computational Recording

02.03.01 The worker compiles reports and documents from sources such as supply lists, invoices, and outlines. (30 task sheets, detail)

02.03.02 The worker updates records and patient charts from lab reports, case histories, and other information. (28 task sheets, detail)

02.03.03 The worker updates records, schedules, and manuals. (19 task sheets, detail)

02.03.04 The worker corrects printouts, forms, and stencils. (19 task sheets, detail)

02.03.05 The worker corrects names on loan files, bank records, and insurance policies from deeds or death certificates. (1 task sheet)

02.04. Duplicating

02.04.01 The worker prepares duplicated materials. (46 task sheets, semi-detail)

02.04.02 The worker duplicates file materials. (42 task sheets, detail)

02.04.03 The worker duplicates items for permanent records. (9 task sheets, detail)

03. TYPING COMMUNICATION

03.00.01 The worker types correspondence, memos, and other items from form and rough draft required by employer. (226 task sheets, detail)

03.00.02 The worker types dictation from shorthand. (172 task sheets, detail)

03.00.03 The worker types communications from dictated belt. (46 task sheets, detail)

03.00.04 The worker types reports from rough drafts. (45 task sheets, detail)

03.00.05 The worker types medical letters, forms, articles, and reports. (38 task sheets, detail)

03.00.06 The worker types statistical information from engineering specifications, lists of checks, and rate sheets. (25 task sheets, detail)

03.00.07 The worker operates a teletype machine. (19 task sheets, detail)

03.00.08 The worker answers requests by typed letters. (17 task sheets, semi-detail)

03.00.09 The worker types information on forms, cards, or letterheads from dictation, applications, computer listings, and other source documents. (17 task sheets, detail)

03.00.10 The worker types reports/bulletins from rough drafts and lists. (14 task sheets, detail)

03.00.11 The worker processes rough draft to duplicated material. (13 task sheets, detail)

03.00.12 The worker types addresses on labels/envelopes. (8 task sheets, semi-detail)

03.00.13 The worker prepares radio commercials from oral instructions. (2 task sheets, semi-detail)

03.00.14 The worker prepares translation of incoming/outgoing Spanish mail. (1 task sheet)

03.00.15 The worker sends telegrams. (1 task sheet, semi-detail)

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01 The worker types insurance documents. (48 task sheets, detail)

04.01.02 The worker processes insurance inquiries. (41 task sheets, detail)

04.01.03 The worker processes insurance claims. (20 task sheets, detail)

04.01.04 The worker prepares reports of new business activity. (2 task sheets, semi-detail)

04.01.05 The worker duplicates claim stickers for insurance policy holders. (1 task sheet, semi-detail)

04.01.06 The worker processes auto club membership applications. (1 task sheet, semi-detail)

04.02. Financial

04.02.01 The worker processes over-the-counter requests and inquiries. (26 task sheets, detail)

04.02.02 The worker processes membership and loan applications in financial institutions such as a credit union. (17 task sheets, detail)

04.02.03 The worker processes new accounts, transfers of accounts, and trust accounts for customers. (8 task sheets, detail)

04.02.04 The worker prepares all stop payments. (5 task sheets, semi-detail)

04.02.05 The worker checks securities and amounts. (4 task sheets, semi-detail)

04.02.06 The worker processes estate settlements for customers. (3 task sheets, detail)

04.02.07 The worker prepares applications for vendor's single interest (VSI) insurance coverage. (2 task sheets, semi-detail)

04.02.08 The worker administers safety deposit boxes. (2 task sheets, semi-detail)

04.02.09 The worker checks claims for transfer, trade, or exchange of securities. (2 task sheets, semi-detail)

04.02.10 The worker compiles broker's daily exchange summary sheets. (2 task sheets)

04.02.11 The worker processes settlement of buy and sell orders. (2 task sheets, semi-detail)

04.02.12 The worker issues payment to utility companies for bills paid at bank. (1 task sheet, semi-detail)

04.02.13 The worker issues receipts for securities. (1 task sheet)

04.02.14 The worker checks numbers and amounts of securities. (1 task sheet)

04.02.15 The worker processes stock transactions to be delivered to another broker. (1 task sheet, semi-detail)

04.02.16 The worker processes trading in municipal bonds. (1 task sheet, semi-detail)

04.02.17 The worker processes outgoing cash letters in foreign currency. (1 task sheet, semi-detail)

04.02.18 The worker processes incoming cash letters from foreign correspondent banks. (1 task sheet, semi-detail)

04.02.19 The worker processes assumptions of loans on request for beneficiary statement indicating a prospective buyer. (1 task sheet, semi-detail)

04.02.20 The worker prepares currency for shipping orders. (1 task sheet, semi-detail)

04.02.21 The worker informs customers that payments made by bank to insurance company have been returned. (1 task sheet)

04.02.22 The worker types insurance cancellation letters. (1 task sheet, semi-detail)

04.02.23 The worker verifies insurance coverage and registration of the bank as legal owner of all auto installment loans. (1 task sheet, semi-detail)

04.02.24 The worker prepares customer payroll schedule. (1 task sheet, semi-detail)

04.02.25 The worker checks errors for large corporations. (1 task sheet, semi-detail)

04.02.26 The worker issues savings certificates. (1 task sheet, semi-detail)

04.02.27 The worker processes savings certificates to be redeemed. (1 task sheet, semi-detail)

04.02.28 The worker prepares travelers checks for customers. (1 task sheet, semi-detail)

04.02.29 The worker prepares Christmas club coupons for customers. (1 task sheet, semi-detail)

04.02.30 The worker obtains permission to grant 30-day credit accounts to potential customers. (1 task sheet)

04.03. Education

04.03.01 The worker types educational lists, schedules, letters, and reports. (27 task sheets, detail)

04.03.02 The worker processes requests in person or by telephone. (12 task sheets, detail)

04.03.03 The worker compiles school records. (10 task sheets, detail)

04.03.04 The worker processes applications for new students. (8 task sheets, detail)

04.03.05 The worker assists in student registration. (6 task sheets, detail)

04.03.06 The worker receives activity funds and fees from students. (6 task sheets, semi-detail)

04.03.07 The worker records attendance. (4 task sheets, detail)

04.03.08 The worker checks student workers' typewritten work. (1 task sheet, semi-detail)

04.03.09 The worker processes applications from special learning disability program schools. (1 task sheet, semi-detail)

04.03.10 The worker issues permits to private trade school solicitors. (1 task sheet)

04.03.11 The worker processes requests for lecturers. (1 task sheet, semi-detail)

04.03.12 The worker processes contracts for scholarship expenses of visiting professors. (1 task sheet, semi-detail)

04.04. Securities

04.04.01 The worker processes stock certificates. (10 task sheets, detail)

04.04.02 The worker prepares stock forms for buying, selling, and transferring stocks. (9 task sheets, detail)

04.04.03 The worker verifies stock documents. (9 task sheets, detail)

04.04.04 The worker answers questions about securities. (6 task sheets, detail)

04.04.05 The worker sends wires to branch stock offices regarding time extensions of payments. (1 task sheet)

04.04.06 The worker processes requisitions for savings bonds. (1 task sheet, semi-detail)

04.04.07 The worker processes call bonds listed in a national publication. (1 task sheet, semi-detail)

04.04.08 The worker issues government bonds. (1 task sheet, semi-detail)

04.05. Hotel/Motel

04.05.01 The worker arranges check-in of guests. (5 task sheets, semi-detail)

04.05.02 The worker records guest charges on room folios. (4 task sheets, semi-detail)

04.05.03 The worker processes incoming mail/messages. (4 task sheets, semi-detail)

04.05.04 The worker arranges check-out of guests. (3 task sheets, semi-detail)

04.05.05 The worker discusses complaints with guests and employees. (2 task sheets, semi-detail)

04.05.06 The worker arranges room reservations. (2 task sheets, detail)

04.05.07 The worker determines vacancies and percent of occupancy. (2 task sheets, semi-detail)

04.05.08 The worker types a function sheet from activities booked. (1 task sheet, semi-detail)

04.05.09 The worker updates hotel/motel mail rack. (1 task sheet)

04.06. Hospital Services

04.06.01 The worker performs procedures for hospital admission from lists of patients, or medical records. (10 task sheets, detail)

04.06.02 The worker arranges hospital discharges. (6 task sheets, detail)

04.06.03 The worker processes patient funds. (4 task sheets, semi-detail)

04.06.04 The worker prepares insurance claims for welfare clients on medicare or medicaid. (2 task sheets, semi-detail)

04.06.05 The worker obtains extensions on ID cards. (1 task sheet, semi-detail)

04.06.06 The worker prepares birth certificates from delivery room records. (1 task sheet, semi-detail)

04.07. Conferences and Meetings

04.07.01 The worker arranges conferences and meetings. (11 task sheets, detail)

04.07.02 The worker processes registration for conference participants. (2 task sheets, semi-detail)

04.08. Welfare and Aid

04.08.01 The worker processes welfare assistance claims. (8 task sheets, detail)

04.08.02 The worker processes applications for welfare assistance. (5 task sheets, detail)

04.09. Repair Service

04.09.01 The worker types service orders and reports. (13 task sheets, detail)

04.10. Library

04.10.01 The worker processes check out/in of library materials. (3 task sheets, detail)

04.10.02 The worker obtains library books from call slips. (2 task sheets, semi-detail)

04.10.03 The worker types library index cards. (1 task sheet, semi-detail)

04.10.04 The worker assists library users in obtaining materials/books. (1 task sheet, detail)

04.10.05 The worker types letters requesting inter-library loans. (1 task sheet, semi-detail)

04.11. Miscellaneous Services

04.11.01 The worker records items such as traffic tickets, activity reports, and press clippings. (10 task sheets, detail)

04.11.02 The worker answers miscellaneous over-the-counter or telephone requests. (8 task sheets, detail)

04.11.03 The worker processes ticket sales. (2 task sheets, semi-detail)

04.11.04 The worker prepares revised city telephone directory. (1 task sheet, semi-detail)

05. ORAL COMMUNICATION

05.00.01 The worker processes incoming telephone calls. (160 task sheets, semi-detail)

05.00.02 The worker answers incoming telephone calls. (117 task sheets, detail)

05.00.03 The worker performs the duties of a receptionist. (50 task sheets, detail)

05.00.04 The worker operates a switchboard. (42 task sheets, detail)

05.00.05 The worker arranges schedules and patients' appointments. (18 task sheets, detail)

05.00.06 The worker answers telephone inquiries. (16 task sheets, detail)

05.00.07 The worker places local and long distance telephone calls. (14 ta sheets, detail)

05.00.08 The worker answers questions regarding patient billing. (3 task sheets, detail)

05.00.09 The worker operates a paging system. (2 task sheets, semi-detail)

05.00.10 The worker requests repairs or maintenance of guest's room. (1 task sheet, semi-detail)

05.00.11 The worker arranges schedules for conference room. (1 task sheet)

05.00.12 The worker arranges doctor/patient conferences. (1 task sheet, semi-detail)

06. ELECTRONIC DATA PROCESSING

06.01. Keypunching, Verifying

06.01.01 The worker punches cards from source documents such as invoices, orders, time cards, and instructions. (96 task sheets, detail)

06.01.02 The worker operates a verifier. (40 task sheets, detail)

06.01.03 The worker operates a keytape machine punching magnetic tape. (8 task sheets)

06.01.04 The worker punches corrections in cards. (7 task sheets)

06.01.05 The worker operates optical scanner for payroll printout. (2 task sheets)

06.01.06 The worker performs quality control checks on the optical-font printing adding machine operator's tape production. (2 task sheets)

06.01.07 The worker punches cards coded for school withdrawal. (1 task sheet)

06.02. Related Electronic Data Processing

06.02.01 The worker checks source documents such as orders, invoices, punched cards, and printouts with computer printouts/listings. (42 task sheets, semi-detail)

06.02.02 The worker performs electronic data processing tasks from such items as computer printouts, files, accounting forms, manuals, maps, and instructions. (22 task sheets, detail)

06.02.03 The worker codes payment cards, checks, and deposit/withdrawal slips for keypunching. (4 task sheets, semi-detail)

06.02.04 The worker maintains control of input/output work flow between corporate trust department and data processing department. (2 task sheets, semi-detail)

06.02.05 The worker corrects computer rejected debits/credits. (2 task she semi-detail)

06.02.06 The worker prepares batches of checks for data processing. (1 task sheet, semi-detail)

06.02.07 The worker types cash letters for checks drawn on bank but cashed elsewhere. (1 task sheet, semi-detail)

06.03. Computer Operation

06.03.01 The worker operates reproducer from punched cards, printed lists, and summary cards. (35 task sheets, semi-detail)

06.03.02 The worker operates (decollates, bursts, binds) computer output. (6 task sheets, semi-detail)

06.03.03 The worker places magnetic tapes on a computer tape drive. (4 task sheets, semi-detail)

06.03.04 The worker prepares weekly payroll from payroll tapes. (4 task sheets, semi-detail)

06.03.05 The worker verifies manually prepared totals with computer detailed totals. (4 task sheets)

06.03.06 The worker operates electronic computer and peripheral equipment. (3 task sheets, semi-detail)

06.03.07 The worker sorts batches of checks. (2 task sheets, semi-detail)

06.03.08 The worker prepares punched cards for computer run. (2 task sheets)

06.03.09 The worker determines computer malfunction by running diagnostics. (2 task sheets)

06.03.10 The worker determines accuracy of data speed machine sending installation. (1 task sheet)

06.04. Coding

06.04.01 The worker codes forms such as purchase orders, invoices, and applications for keypunching. (45 task sheets, semi-detail)

06.05. Sorting, Interpreting, Collating, Reproducing, and Tabulating

06.05.01 The worker operates unit record equipment such as the sorter, reproducer, collator, and interpreter. (22 task sheets, semi-detail)

06.05.02 The worker codes forms such as account statements, production figures, inventory listings, punched cards, wired or unwired boards for keypunching. (5 task sheets)

06.05.03 The worker operates optical scanning equipment to convert printed data to punched data. (4 task sheets)

06.05.04 The worker adjusts errors on computer input tape. (1 task sheet)

06.06. Computer Programming

06.06.01 The worker writes computer programs. (18 task sheets, detail)

06.06.02 The worker checks computer programs. (4 task sheets, semi-detail)

06.06.03 The worker writes computer program in final form. (3 task sheets, semi-detail)

06.06.04 The worker adjusts present computer programs. (1 task sheet, semi-detail)

06.06.05 The worker punches prescribed program changes for new computer. (1 task sheet, semi-detail)

06.06.06 The worker arranges a time schedule for a new computer program. (1 task sheet, semi-detail)

07. PERSONNEL

07.00.01 The worker processes employment applications. (68 task sheets, detail)

07.00.02 The worker updates personnel files from changes received. (54 task sheets, detail)

07.00.03 The worker arranges orientation of new employees. (37 task sheets, detail)

07.00.04 The worker administers employment tests to applicants. (36 task sheets, semi-detail)

07.00.05 The worker types personnel reports from such documents as personnel lists, appointment cards, and rough drafts. (35 task sheets, detail)

07.00.06 The worker types personnel letters, forms, and cards from documents such as rough draft letters, employment forms, and claim forms. (25 task sheets, detail)

07.00.07 The worker compiles payroll information from absentee reports, union cards, and requests for leave. (23 task sheets, detail)

07.00.08 The worker compiles new employee personnel data from employment forms, questionnaire work sheets, and applications. (21 task sheets, detail)

07.00.09 The worker arranges travel. (18 task sheets, detail)

07.00.10 The worker processes travel vouchers. (10 task sheets, detail)

07.00.11 The worker arranges transportation from city car pool. (2 task sheets, semi-detail)

07.00.12 The worker processes merit award papers and pins. (2 task sheets)

07.00.13 The worker assists in labor grievances. (2 task sheets)

07.00.14 The worker issues working papers to students. (2 task sheets)

07.00.15 The worker issues parking permits. (1 task sheet)

07.00.16 The worker issues employee pass cards. (1 task sheet)

07.00.17 The worker issues student work permits. (1 task sheet)

07.00.18 The worker issues social security cards. (1 task sheet)

07.00.19 The worker administers driver tests. (1 task sheet)

07.00.20 The worker arranges annual awards meetings. (1 task sheet)

07.00.21 The worker issues entertainment tickets. (1 task sheet)

07.00.22 The worker discusses labor contract provisions. (1 task sheet)

07.00.23 The worker assists in union/management meetings. (1 task sheet)

07.00.24 The worker administers highway safety program for salesmen. (1 task sheet)

07.00.25 The worker requests student nurses' health examination appointments. (1 task sheet, semi-detail)

07.00.26 The worker updates personnel forms. (1 task sheet, semi-detail)

07.00.27 The worker administers an orientation program for new hospital employees. (1 task sheet, semi-detail)

08. SALES

08.00.01 The worker processes sales documents such as charge slips, purchase orders, warrants. (30 task sheets, detail)

08.00.02 The worker processes requests by telephone and over the counter. (25 task sheets, detail)

08.00.03 The worker types correspondence from dictation, incoming mail, and other source documents. (24 task sheets, detail)

08.00.04 The worker types sales items from rough drafts, proposals, lists, and other source documents. (19 task sheets, detail)

08.00.05 The worker types orders, memos, and invoices. (16 task sheets, semi-detail)

08.00.06 The worker arranges layouts for classified ads. (14 task sheets, semi-detail)

08.00.07 The worker answers customer complaints. (13 task sheets, detail)

08.00.08 The worker processes classified ads and ad complaints. (12 task sheets, detail)

08.00.09 The worker processes customer orders. (10 task sheets, detail)

08.00.10 The worker records orders, printouts, and changes. (9 task sheets, semi-detail)

08.00.11 The worker updates manuals, catalogs, price lists, and customer accounts. (9 task sheets, semi-detail)

08.00.12 The worker composes memos, responses, and TV commercials. (8 task sheets, semi-detail)

08.00.13 The worker prepares price quotations for customers and salesmen. (8 task sheets, detail)

08.00.14 The worker requests new or extended advertising orders. (7 task sheets, semi-detail)

08.00.15 The worker arranges schedules for TV/radio commercials. (5 task sheets, semi-detail)

08.00.16 The worker mails product information and advertising materials to customers, prospective customers. (4 task sheets, semi-detail)

08.00.17 The worker processes supply requisitions for company salesmen. (2 task sheets, detail)

08.00.18 The worker prepares new customer plates on graphotype machine. (1 task sheet, semi-detail)

08.00.19 The worker records machine moves from installation transmittals. (1 task sheet)

08.00.20 The worker checks unfilled and back orders. (1 task sheet)

08.00.21 The worker completes forms for installation of business equipment delivered. (1 task sheet)

08.00.22 The worker arranges travel for employees' speaking engagements. (1 task sheet)

08.00.23 The worker operates microfilmer on all detail tickets, charge slips, and returned merchandise. (1 task sheet)

08.00.24 The worker files advertisements from clipping agency. (1 task sheet)

08.00.25 The worker prepares dummy for new books to be published. (1 task sheet, semi-detail)

08.00.26 The worker assists committees in public relations activities. (1 task sheet, semi-detail)

08.00.27 The worker processes lay-away tickets and merchandise. (1 task sheet)

08.00.28 The worker calls businesses for report of company's goods sold or monies collected. (1 task sheet)

08.00.29 The worker arranges for a commercial photographer to take pictures of equipment manufactured. (1 task sheet)

08.00.30 The worker arranges sample display for salesmen or customers. (1 task sheet)

08.00.31 The worker informs customer or insurance coverage. (1 task sheet)

08.00.32 The worker arranges sales plan for department store yearly sales. (1 task sheet)

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.01 The worker processes orders from inventory. (24 task sheets, detail)

09.01.02 The worker updates inventory records from office supply inventory documents. (24 task sheets, detail)

09.01.03 The worker records finished-goods inventory from production and shipping data. (8 task sheets, semi-detail)

09.01.04 The worker completes physical inventory. (6 task sheets, semi-detail)

09.01.05 The worker maintains inventory records on stock sent to production. (4 task sheets)

09.01.06 The worker compiles revised inventory descriptions periodically. (1 task sheet)

09.01.07 The worker proofreads semi-automated stock reports for keypunching. (1 task sheet)

09.01.08 The worker transfers stock from warehouse supplies to substore. (1 task sheet)

09.01.09 The worker prepares inventory report for salesmen. (1 task sheet)

09.02. Shipping

09.02.01 The worker types shipping manifest/bills of lading, and waybills. (9 task sheets)

09.02.02 The worker arranges delivery routes. (7 task sheets, detail)

09.03.03 The worker processes shipping and billing forms on completed jobs. (6 task sheets, detail)

09.03.04 The worker verifies contents of outbound shipments. (6 task sheets, detail)

09.03.05 The worker checks undelivered shipments. (5 task sheets, detail)

09.03.06 The worker sends letter/teletype to customer regarding merchandise shipment. (3 task sheets)

09.03.07 The worker distributes shipment listings. (3 task sheets)

09.02.08 The worker records shipments. (3 task sheets)

09.02.09 The worker completes shipping reports. (1 task sheet)

09.03. Receiving

09.03.01 The worker records inbound shipments. (9 task sheets, detail)

09.03.02 The worker arranges expediting of inbound shipments. (4 task sheets, semi-detail)

09.03.03 The worker issues a claim or an adjustment against the carrier/supplier for damaged/short/overshipments. (3 task sheets)

09.03.04 The worker processes damage claims. (2 task sheets)

09.03.05 The worker processes freight bills for payment. (1 task sheet)

09.03.06 The worker arranges return of leased machinery. (1 task sheet)

09.03.07 The library worker determines disposition of incoming books. (1 task sheet, semi-detail)

10. PURCHASING

10.00.01 The worker maintains supplies and stock inventory. (94 task sheets, detail)

10.00.02 The worker types purchasing documents. (30 task sheets, detail)

10.00.03 The worker arranges expediting of purchase shipments. (5 task sheets, semi-detail)

10.00.04 The worker administers purchase and sale of stamps for hospital and patients. (1 task sheet)

11. PRODUCTION

11.00.01 The worker processes schedules and adjustment of scheduled production orders. (23 task sheets, detail)

11.00.02 The worker types production reports. (16 task sheets, detail)

11.00.03 The worker discusses production problems with potential customers. (1 task sheet, semi-detail)

12. MISCELLANEOUS

12.00.01 The worker completes minor repairs and maintenance of duplicating machines. (6 task sheets)

12.00.02 The worker operates collator. (4 task sheets)

12.00.03 The worker completes binding and padding of printed forms. (3 task sheets)

12.00.04 The worker arranges for supply and movement of equipment requested. (3 task sheets)

12.00.05 The worker performs time and motion studies. (3 task sheets)

12.00.06 The worker arranges graphic display of test results. (3 task sheets)

12.00.07 The worker completes tests and reports of company products. (3 task sheets)

12.00.08 The worker arranges reception room and coffee serving for employees and guests. (3 task sheets)

12.00.09 The worker delivers vouchers or other special documents. (2 task sheets)

12.00.10 The worker processes delinquent auto loan collections. (2 task sheets)

12.00.11 The worker prepares drawings of buildings or rocket engines. (2 task sheets)

12.00.12 The worker determines process for new product. (1 task sheet)

12.00.13 The worker discusses handling of franchise contracts. (1 task sheet)

12.00.14 The worker packages financial records for permanent storage. (1 task sheet)

12.00.15 The worker calls doctors, hospitals, police, fire department, and insurance carrier in emergencies. (1 task sheet)

12.00.16 The worker operates lost and found department. (1 task sheet)

12.00.17 The worker prepares bill of materials from blueprints. (1 task sheet)

12.00.18 The worker arranges format of computer output sheets. (1 task sheet)

12.00.19 The worker assists technicians such as electricians, plumbers, and painters. (1 task sheet)

12.00.20 The worker operates a tag machine for pricing merchandise. (1 task sheet)

12.00.21 The worker operates gift wrapping service for customers. (1 task sheet)

12.00.22 The worker checks phonograph records. (1 task sheet)

12.00.23 The worker codes meter readings for utility billings. (1 task sheet)

12.00.24 The worker assists in wind tunnel tests. (1 task sheet)

12.00.25 The worker processes labels by dating, sorting, and filing. (1 task sheet)

NUMBER OF COMPETENCIES NEEDED BY

JOB CATEGORY AND TITLE

JOB TITLE	COMPETENCY AREA												
	Numerical Clerical Records	Internal Services	Typing Communication	Client Related Services	Oral Communication	Electronic Data Processing	Personnel	Sales	Inventory, Shipping, Receiving	Purchasing	Production	Miscellaneous	Total
MACHINE OPERATORS	29	3	7	1		14	7		1			4	66
Adding Machine Operator	15											1	16
Calculating Machine Operator	26					1						1	28
Key-Punch Operator	3					13			1			1	18
Transcriber, Head			3									1	4
Transcribing Machine Operator			7									1	8
Duplicating Machine Oper. II		3	3	1								4	11
Duplicating Machine Oper. III		3	2	1								4	10
Offset Duplicating Operator		3	1	1								4	9
CLERK	76	34	14	85	12	13	26	29	25	4	2	20	340
Accounting Clerk	74	4		38	1	8	2	6	6	2		7	148
Appointment Clerk			1	2	8			1				1	13
Billing Clerk II	20			1			1	1	2			1	26
Correspondence Clerk	6	27	9	4		1		3	1			6	57
File Clerk I	1	8						1				2	12
File Clerk II		8						1				2	11
General Clerk	54	34	9	72	12	1	6	20	25	4	2	12	251
General Office Clerk	64	34	11	79	12	5	13	27	25	4	2	15	291

NUMBER OF COMPETENCIES NEEDED BY

JOB CATEGORY AND TITLE

JOB TITLE	COMPETENCY AREA												
	Numerical Clerical Records	Internal Services	Typing Communication	Client Related Services	Oral Communication	Electronic Data Processing	Personnel	Sales	Inventory, Shipping, Receiving	Purchasing	Production	Miscellaneous	Total
Payroll Clerk	13			1		3	1					1	19
Personnel Clerk	2	2	2	4	1		26	1				3	41
Posting Clerk	23					1	3	1	1			1	30
Receptionist	3	16	6	12	12		2	3				3	[illegible]
Stenographer	1	2	12	4		1	2	3				1	26
TYPISTS	13	23	13	22	2	3	2	5	3	1	1	2	90
Automatic Typewriter Oper.	3	7	11	4		1	1	3	1		1	1	33
Clerk-Typist	10	23	12	19	2	1	2	4	3	1	1	1	79
Data Typist	5	6	8	2		2					1	1	25
Typist	10	14	13	13	2	2	2	5	2	1	1	2	67
SECRETARY	75	34	14	84	12	9	26	32	21	4	3	16	330
Administrative Secretary	71	32	14	59	9		23	27		2	2	8	247
Legal Secretary	12	27	11	11	11		12	4				2	90
Medical Secretary	23	29	12	19	11		15	4		1		1	115
Secretary	71	34	14	84	12	9	24	32	21	4	3	15	323
Social Secretary	3	4	10	2	7		9	2				2	39

NOBELS COMPETENCIES

COMMON TO ALL OFFICE OCCUPATIONS

01. NUMERICAL CLERICAL RECORDS

01.01 Accounts Receivable

01.01.03 01.01.07
01.01.05 01.01.08
01.01.06

01.03 Payroll

01.03.03
01.03.09
01.03.13

All included for Clerk occupations; only 01.07.02 excluded from Secretary occupations.

02. INTERNAL SERVICES (Code 15)

02.04 Duplicating

02.04.01
02.04.02
02.04.03

All common to Clerk and Secretary occupations.

03. TYPING COMMUNICATION (TC)

03.00.01 03.00.05
03.00.02 03.00.08
03.00.03 03.00.09
03.00.04 03.00.11

All, with exception of 03.00.13 were included for Clerk, Typists and Secretary occupations. Typists occupations did not include 03.00.13 either.

04. CLIENT RELATED SERVICES

None for all occupations.
All for Clerk occupations
Only 04.05.09 omitted from Secretary occupations.

05. ORAL COMMUNICATION

None for all occupations.
All for Clerk and Secretary occupations.

06. ELECTRONIC DATA PROCESSING

None common to all occupations.

Of the 35 competencies, Machine Operators (14), particularly Keypunch Operator and Clerks (13) were identified as needing the most data processing training.

07. PERSONNEL (27 competencies)

All competencies with the exception of 07.00.19 "The worker administers driver tests" were common to Clerk and Secretary occupations.

08. SALES (32 competencies)

All common to Secretary only.

09. INVENTORY, SHIPPING, RECEIVING (25 competencies)

All common to Clerk occupations only.

10. PURCHASING (4 competencies)

All common to Clerk and Secretary occupations only.

11. PRODUCTION (3 competencies)

All common to Secretary occupations only.

12. MISCELLANEOUS

12.00.02
12.00.15

COMPETENCIES FOR

MACHINE DICTATION AND TRANSCRIPTION

Use dictation and transcription equipment.

Transcribe directly from transcription equipment.

Dictate effectively into transcribing equipment.

Transcribe mailable letters and other communications, articles and other materials.

Recognize responsibility in producing perfect copy by utilizing correct grammar, spelling, terminology and punctuation.

Accept responsibility in decision making.

Apply correct office value and attitude in all phases of work.

OVERALL COMPETENCIES - DICTATION

The student will

1. take dictation accurately at an acceptable speed.
2. transcribe dictation quickly and efficiently.
3. type correspondence that is completely free from typographical and spelling errors.
4. use proper and acceptable English both in speech and writing.
5. command an adequate vocabulary, especially in relation to office procedures and business functions.
6. practice discretion and tact.
7. understand that loyalty is one of the strongest assets an office worker can have to assure a pleasant and continued working relationship.
8. demonstate grooming practices that are acceptable to employers both when seeking employment and while on the job.
9. behave with courtesy and friendliness.
10. accept responsibility in making decisions.

ON-THE-JOB TASKS - DICTATION

The worker will

1. take dictation in shorthand.
2. transcribe dictation on the typewriter.
3. compose and type routine correspondence.
4. read and route incoming mail.
5. locate and attach appropriate file to correspondence to be answered by employer.
6. file correspondence and other records.
7. record minutes of staff meetings.
8. type correspondence, memos and other items from form and rough draft required by employer.
9. type information on forms, cards or letterheads from dictation, applications, computer listings and other sources.
10. accept responsibility in making decisions.
11. behave in a courteous and friendly manner.

COMPETENCIES FOR OFFICE MANAGEMENT

Knowledge of the role of an information manager.

Knowledge of the effects of automation on office jobs, education and training of office personnel and company operations.

Organize and plan office services.

Ability to use proper procedures and techniques for staffing an office.

Ability to function as a supervisor.

Knowledge of promotional plans and training programs.

Knowledge of systems analysis as it pertains to office systems and procedures.

Knowledge of budgets needed in operating an office.

Prepare an office manual.

COMPETENCIES FOR RECORDS MANAGEMENT

Code documents and correspondence.

Implement cross-referencing procedures.

Process materials for filing.

File materials.

Update central index files.

Maintain a tickler file.

Process requests for records or files.

Update files.

Maintain inactive files and dispose of obsolete materials.

Revise filing systems.

Maintain appropriate filing equipment and supplies.

Use microfilm and microfiche to secure desired information.

COMPETENCIES FOR

TERMINOLOGY AND VOCABULARY

BUSINESS, LEGAL, MEDICAL

Knowledge of phonics to the extent that principles can be used in pronunciation.

How to use a dictionary as a pronunciation guide, spelling aide and definition source.

How to apply phonics to spelling.

Knowledge of spelling rules - phonetics and nonphonetics.

Knowledge of words that are often mispronounced, misspelled and misused.

Ability to identify what part of speech a word is through knowledge and/or by use of the dictionary.

Understanding of homonyms, synonyms and antonyms.

Knowledge of appropriate use of abbreviations, titles and captials.

Knowledge of various sources contributing to language growth.

Ability to expand one's vocabulary.

Knowledge of terminology and vocabulary utilized in various business and industry occupations.

COMPETENCIES FOR WORD PROCESSING

Demonstrate the ability to identify, spell and define word processing terms to the instructor's standard for approval.

Demonstrate a conceptual knowledge of the structuring of a word processing system in business, industry or government to the instructor's standard for approval.

Demonstrate the rapid and accurate use of reference materials.

Exhibit acceptable oral communication skills consistently.

Demonstrate decision-making and problem-sovling abilities consistently.

Exhibit desirable cooperative attitude traits consistently.

Exhibit an acceptable knowledge of careers in word processing.

Demonstrate good manpulative techniques on a power keyboard consistently.

Proofread and revise documents within a reasonable time.

Demonstrate good manipulative machine transcription techniques consistently.

Produce documents from magnetic media rapidly and accurately.

File, log and maintain magnetic media accurately.

Manage time and tasks properly and reasonably.

Originate formats correctly, utilizing coding applicable to format.

Determine priorities for all work, doing most important work first, within a reasonable time period.

Supervise word processing center with consistent control.

Determine priorities for all work, doing most important work first, within a reasonable time period.

File and maintain records accurately.

Produce multiple copies of documents rapidly and accurately on reprographic equipment.

Dictate documents accurately onto magnetic media from printed or hand-written copy following correct dictating procedures.

Originate and dictate simultaneously in correct format, from an outline for original document writing, documents that contain all essential information.

Administer secretarial and clerical support as necessary.

Implement procedures and interpret flow of work with designated controls.

RELATED COMPETENCIES

Related

These competencies were not abstracted from the NOBELS system but were developed as a part of the business related competencies for business and office occupations by the Secretarial Science Curriculum and Advisory Committees.

INTRODUCTION TO BUSINESS

The student will have knowledge of or understanding that or will be skilled in:

Capitalism and how it affects the growth of business in the United States.

Basic economic principles of supply and demand.

The factor of production, and the characteristics of capitalism on which the U.S. business system is based.

The development of business in the United States.

Using the principles of supply, demand and elasticity to explain prices in relation to quantity supplied and demanded.

The legal forms of organization.

The basic internal forms of organization.

The basic principles and functions of management.

The advantages and disadvantages of the different legal forms of business organization.

The purposes of an internal organization and the major form of internal organization.

The importance of management in business, and the terminology related to management.

Basic principles of selecting a plant layout, location and inventory control method.

The important factors that determine a good location, the factors in determining layout for both factories and retail stores and terms and principles of inventory control.

The different production processes, the types of production and principles of production control.

How unions and labor legislation develop.

Degrees of recognition given by employers to union.

The weapons used by unions.

How union/management disputes are settled.

Recruiting employees.

Selecting and training prospective employees.

How to compensate and motivate employees.

Basic terminology in the fields of accounting budgets, statistics, research and forecasting.

The account equation, with emphasis on the income statement and balance sheet.

Usefulness of statistical techniques and ways to present statistical information.

The scientific methods of research and the different techniques of forecasting.

Marketing and pricing in the retailing and wholesaling segments of the business environment.

The functions of marketing.

How supply and demand affect prices, the effect the different economic market models (pure competition, monopoly, etc.) have on prices, and the different price policies in business.

The functions and types of wholesalers and retailers.

The function and importance of advertising, the types of advertising media and when they are most useful.

The advantages and disadvantages of the different transportation and communication methods.

The powers of government agencies that regulate transporation and communication.

The benefits of and the obstacles on international trade.

The different marketing channels of exporting and the methods of financing exports and imports.

Accounting

The student will have knowledge of or understanding that:

The accounting equation and accounts and their relationship to debits and credits.

The purpose for a work sheet.

The types of various journals and ledgers used in business and industry.

The work necessary to close a simple set of books.

The essential financial statements needed in business and industry.

The handling of and accounting for cash receipts and disbursements, including various considerations involved in keeping cash and non-cash items in a commercial bank.

The controls in a system that are established to insure accurate accounting for cash.

The procedures for control over non-cash items.

The types of renumeration in payrolls and payroll algorithms.

The use of payroll records.

The use of flowcharts in a payroll system.

How to recongize a promissory note.

The flow of costs using first in, first out method (FIFO).

The flow of costs using last in, first out method (LIFO).

The flow of costs using weighted average.

The distinction between periodic and perpetual inventory methods.

The estimated cost figure for merchandise inventory using the retail method.

The estimated cost figure for merchandise inventory using the gross profit method.

The destinction between deferrals and accruals.

The position of deferrals and accruals on the balance sheet.

The deferrals and accruals requiring reversing entries.

The initial costs of plant assets.

The position of depreciation on the income statement and the balance sheet.

How to recongize an intangible asset and record its related amortization.

The student will be skilled in:

Classifying accounts according to the elements in the accounting equation.

Debiting and crediting accounts to show increases and decreases in the acounting equation.

Using general ledgers and general journals.

Using special ledgers and special journals.

Correlating transactions between general and special ledgers and general and special journals.

Determining the equality of debits and credits in a ledger using the trial balance.

Making adjusting entries and balancing to correct figures.

Making closing entries and summarizing into one account.

Completing a worksheet.

Making reversing entries.

Preparing an income statement.

Preparing a capital statement or retained earnings statement, whichever is applicable.

Preparing a balance sheet.

Accurately preparing payroll records.

Computing wages.

Computing net pay.

Computing employer's payroll taxes.

Computing interest on a promissory note using the 60-day, 6% method.

Recording appropriate transactions for interest-bearing and discounted notes payable and notes receivable.

Recording the estimated adjusting figures for the allowance account for accounts receivable.

Writing-off uncollectible accounts.

Recording adjustments for deferred expenses.

Recording adjustments for deferred income.

Recording adjustments for accrued expenses.

Recording adjustments for accrued income.

Computing and recording related depreciation.

Recording the disposal or sale of plant assets.

Recording the amortization of an intangible asset.

The student will have the attitude:

That the accounting equation has an important effect on business transactions.

That much work is necessary to close a simple set of books.

That accurate financial statements are essential in the operation of a business.

That accurately accounting for cash and non-cash items is essential to the operation of a business.

That accounting procedures for notes, accounts receivable and accounts payable and their related activities are essential to the operation of a business.

That various methods of computing flow of costs in and estimating costs for merchandise inventory is important.

That it is important to determine correctly the cost value of merchandise inventory.

That funding essential information through an accounting system is important to the operation of a business.

BUSINESS MATHEMATICS

The student will have knowledge of or understanding that or will be skilled in:

Round decimal numbers.

Add whole numbers and decimals.

Subtract whole numbers and decimals.

Multiply whole numbers and decimals.

Divide whole numbers and decimals.

Add, subtract, multiply and divide fractions.

Reduce fractions to the lowest terms.

Add, subtract, multiply and divide mixed numbers and improper fractions.

Convert fractions, decimals and percents.

The methods and formula for determining percentages.

The methods and formula for determining base.

The methods and formula for determining the rate.

The methods and formula for determining the rate of increase or decrease.

Compute the total list price of a purchase.

Compute trade discounts.

Compute cash discounts.

Set a selling price by using the markup formula.

Compute gross profits by using the formula for gross profit.

Compute freight charges and sales tax on sales.

Compute depreciation using the straight-line method.

Compute depreciation using the units-of-production method.

Compute depreciation using the machine-hours method.

Calculate depreciation using the declining-balance method.

Calculate depreciation using the sum-of-the-year's digit method.

Calculate additional first-year depreciation.

Calculate gains and/or losses on the sale of tangible assets.

Compute gross wages, federal withholding tax, FICA tax and the net wages for an employee.

Compute the employer's expense for employees.

The types of insurance needed in business and industry and for personal property.

Compute simple interest for a year or more.

Compute simple interest for less than a year.

Compute simple interest using the 60-day, 6% method.

Compute simple interest using the simple interest tables for a 360-day year and a 365-day year.

Find the due date of a promissory note.

Determine the maturity date on a bank discount and to compute terms of discount.

Compute the proceeds of a discounted customer's note.

Compute compound interest.

Compute compound interest on savings accounts.

Find the amount of annuity on a sum of money by using an annuity table.

Calculate the present value on a sum of money with and without a present value table.

Compute the total cost for an installment purchase.

Compute the finance charges on an installment purchase.

Compute the monthly (periodic) payment on an installment purchase.

Compute the finance charge on an actuarial loan.

Prepare a debt reduction schedule.

Compute the true annual interest rate on an installment purchase.

Compute the true annual interest rate on a financial loan.

Compute the true annual interest rate using the constant ratio formula.

Reconcile a bank statement.

Figure the value of inventories using one of the four inventory methods and compute the turnover.

Translate decimal numbers to the equivalent binary numbers and translate binary numbers to the equivalent decimal numbers.

Convert decimal and binary numbers and translate hexadecimal numbers to decimal and binary numbers.

The mathematics of business ownership.

The mathematics of investment.

The mathematics of summary and analysis.

ECONOMICS I

The student will have knowledge of or understanding that or will be skilled in:

The mechanics of economic systems in general and free enterprise specifically.

The economic problem in terms of scarcity, opportunity, costs and decision-making.

The principle of diminishing marginal utility as applied to personal decision-making from specific assumptions.

Marginal decision-making and its application to the business firm's goal of profit maximization.

The basic processes by which group decisions are made.

The group processes translated into three (3) basic economic labels, and applied to world economic systems.

The two key indicators by which systems should be judged as the three basic economic labels.

Our economic system evaluated in terms of production ownership and distribution of the output.

How specialization can lead to production of more things.

The principle of comparative advantage and its relationship to both individuals and groups.

Define and differentiate between the terms income and wealth.

The meaning of Adam Smith's term "the invisible hand," in relation to direction of economic activity.

Production in terms of kinds of utility.

The four production factors in a market economy.

Build a circular flow of economic activity in a market system.

Spending units and effects of their activities on the circular flow.

The three major goals of our economic system and the results of lack of achievement of each.

The four (4) functions of money.

Six desirable qualities (characteristics) of "good" money.

Define and exemplify full-bodies (asset), commodity, token, representative and fiat money.

The significance of Gresham's Law in a multi-money system.

The problems associated with money and the Colonists, the Revolution, the Civil War and the Depression.

Trace our money through the gold standard, the gold coin standard, the gold bullion standard, the "managed" bullion standard and into the present fiat standard.

The three kinds of money in our system today and approximate amounts.

Contrast the commercial bank and its functions to other financial institutions.

Numerically illustrating the process of money "creation."

Expansion factor and limitations on money supply based on given assumptions.

The chief restrictions resulting from the 1930's bank failures.

The meaning, purpose and limits of the Federal Department of Insurance Corp.

The Federal Reserve System in relation to money and banks.

The Federal Reserve management in relation to our political system.

How and where we fit into the geographic organization.

The three control measures by which the Federal Reserve System carries our monetary policy.

The important functions of the Federal Reserve System other than to monetary control.

The need for government, thus money and money management.

The three (3) management functions of government finance.

The major expense of the various levels of government.

Five basic reasons for increase in government spending.

Define "tax" in contrast to assessment.

Adam Smith's four guidelines for a tax system.

Define and differentiate between cost-of-service, ability-to-pay and equality-of-sacrifice theories of taxation.

Define and differentiate between proportional, progressive and degressive rate structures and illustrate each numerically.

The arithmetic of taxation based on specific assumptions.

The major sources of income to each level of government.

The four (4) basic justifications for government borrowing.

The approximate size of the national debt and its relation to the gross national output.

The annual cost of the debt from an assumed interest rate.

The motive of the creditors.

The trend of growth and reduction in recent years.

Relate fiscal policy to prices, employment and the circular flow.

Coping with the national debt.

Contrast federal debt motive and management to that of other levels of government.

The four (4) stages of the business cycle.

The accelerator and multiplier principles of business activity.

The economic situation typical of each stage of the business cycle.

Define and illustrate inflation.

Price increases and wage increases that are NOT an example of inflation.

The three (3) chief types of inflation.

Positive or negative effect of inflation on: The lender, the saver, consumer, borrower, exporting, importing, retirees, investors and taxpayers.

Some possible remedies for inflation.

Develop and interpret a price index.

BUSINESS LAW I

The student will have knowledge of or understanding that or will be skilled in:

Develop an awareness of the legal environment.

Develop a consciousness that business decisions are considered and endorsed in light of their legal ramifications.

Identify the basic principles of law and the classification of the courts.

Explain the basic legal considerations of contracts.

Apply the Uniform Commercial Code and the Uniform Sales Act to specific market transactions.

Identify and apply devices for facilitating commercial transactions.

Identify the nature and ownership of personal property.

Identify the legal relationship between the "principal" and the "agent" in modern business conditions.

Identify the basic principles of law concerning the formation, operation and dissolution of the partnership form of business organization.

Identify the basic principles of law concerning the formation, operation and dissolution of the partnership, merger and consolidation of the corporate form of a business equity.

Illustrate the significance of bankruptcy laws in present-day society.

Discuss the nature of real property, transactions and in general, real estate laws applicable to business.

DATA PROCESSING

The student will have knowledge of or understanding that or will be skilled in:

Know fundamental concepts and operational principles of data processing systems.

Define terminology used in data processing systems.

Demonstrate ability to define and identify symbols used in machine processed data - fields, rows, columns, etc.

Know types of information used for computer input and computer controls or input.

Know how to interpret and use computer output.

Draw a flowchart and write a computer program using the chart.

GENERAL EDUCATION COMPETENCIES

General Education

GRAMMAR

The student will have knowledge of or understanding that or will be skilled in:

Identify and use correctly the principal parts of speech.

Identify, name and use nouns correctly.

Identify the forms and uses of verbs.

Identify and use the correct forms of pronouns.

Identify adjectives and adverbs.

Identify prepositions and conjunctions as connectors.

Select the proper words to be used in writing.

Divide words in writing.

Identify a complete sentence.

The types of sentences.

Identify and write the four sentence classes.

Write sentences with variety.

The types of sentences and the correct end punctuation.

Identify comma uses:

1. To introduce.
2. To separate.
3. To enclose.
4. To indicate omission.

Identify and use the internal marks of punctuation.

Construct a paragraph using a topic sentence.

Identify and construct a topic sentence and expand the topic sentence by various methods.

Place sentence in effective order.

Write paragraphs with unity and coherence.

Recognize mistakes in written materials and make the necessary corrections.

COMPOSITION

The student will have knowledge of or understanding that or will be skilled in:

Write clearly and effectively.

Write a paragraph.

Development of a composition.

Review of grammar.

Development of a direct prose style.

Construct a prose style and avoid mechanical errors.

Types of writing.

Various writing techniques needed in preparing technical reports, business communications and other written communications.

Write short essays in limited time period.

Select topics for papers.

Compose writings that exhibit the techniques of exposition, persuasion, description, narration and dialogue.

Identify grammatically correct/incorrect sentences.

Use the library and resource materials in writing.

Read written communication.

Analyze written communication.

Revise written communication.

ORAL COMMUNICATION

The student will have knowledge of or understanding that or will be skilled in:

Basic concepts of oral communication.

Elements of communication.

Circular response in communicating.

Criteria for effective speech.

Steps to achieve more effective speech.

Use the body to communicate.

Use the voice to communicate.

The mechanics of speaking.

Prepare the speech.

Analyze the audience.

Analyze the occasion for the speech.

Determine the purpose of the speech.

General purposes for speeches:

1. To entertain.
2. To inform (educate).
3. To persuade.
4. To discuss (exchange ideas).

Select the subject for the speech.

Gather material for a speech.

Organize the material for a speech.

Practice the speech aloud.

Effective listening.

BUSINESS COMMUNICATION

<u>The student will have knowledge of or understanding that or will be skilled in</u>:

The basic principles in business communications.

The basic C's of business writing and why they are important in developing writing style.

Writing as a two-way process.

Develop a personal writing style through a study of the techniques of style.

The parts of speech and other grammar rules.

The types of letter forms or styles.

The basic parts of a business letter.

The mechanics of a business letter.

Write a business letter and critique the letter.

A scale for rating business letters.

Identify and critique a request letter.

Write a request letter.

Identify and critique a response letter.

Write a response letter.

Identify and critique an order letter and order form.

Write an order letter.

Identify and critique claim and adjustment letters.

Write a claim letter.

Write an adjustment letter.

Identify and critique letters in the credit and collection series.

Write the types of letters in a credit and collection series.

The recommended procedure when applying for a job, and application of this procedure.

A personal data sheet.

An application letter.

Filling in a job application blank.

A secretary's writing responsibilities in an office.

Write an interoffice memorandum.

Other forms of communications that may be found in a business office.

The types of meetings requiring minutes and the importance of minutes.

The types of reports used by business and industry.

Dictate letter to a secretary.

Dictate letter on a dictaphone.

Proof-read and sign a letter properly.

REPORT WRITING

The student will have knowledge of or understanding that or will be skilled in:

Write coherent and comprehensive sentence definitions and develop expanded definitions.

Describe a mechanism and explain a process.

Identify the types of reports and explain proficiency in reporting.

Recognize the qualities to strive for in good reports.

Compile reports by filling in blank forms.

Compile letter reports.

Compile a progress report.

Interpret and complete miscellaneous reports.

Identify a covering memorandum.

Prepare the necessary information for a title page.

Organize and prepare information for a table of contents.

Compile summaries and abstracts proficiently.

Prepare adequate information for an effective introduction.

Write conclusions and make logical recommendations.

Compile a bibliography from varied sources.

Select an appropriate topic and narrow it for effective development.

Develop an outline in logical order.

Implement the use of tables and figures in reports.

Write the first draft from note cards of materials gathered.

Make revisions of the first draft.

Identify the use of the inter- and intra-firm proposal.

Make effective use of a proposal.

Write the segments of a proposal.

Write a letter of application adhering to acceptable standards of business correspondence.

Identify and write each part of the letter effectively.

Compile a resume to accompany the application letter.

Write an acceptable letter following the interview.

INTERPERSONAL RELATIONSHIPS AND COMMUNICATIONS

The student will have knowledge of or understanding that or will be skilled in:

Differentiate between the concepts of communication and conversation and demonstrate this knowledge by comparing and contrasting the characteristics of each.

Be cognizant of barriers of communication and discuss and examine through class participation the four following barriers which hamper communication:

1. Differences in culture and life styles.

2. Negative emotions.

3. Second language.

4. Biases and prejudices.

Know the common attributes of all interviews; demonstrate this knowledge in writing by citing examples of the following attributes from the case studies of hypothetical interviews:

1. Purpose.

2. Needs of interviewee.

3. Behavior of interviewee.

4. Skills, knowledge and attitudes required of interviewer.

5. Program and policy of agency.

Know the fundamentals of interviewing and demonstrate knowledge by exhibiting the following behavior through role-play activity in class:

1. Preparation for interview by worker.

2. Clear statement of purpose of interview.

3. Establishment of a positive, helpful tone and climate for the interview.

4. Enactment of the role of interviewer as a representative of an organization or agency.

Know the basic skills necessary to the development of helping relationships with people and demonstrate this knowledge by identifying and explaining in writing the following basic skills:

1. Objectivity.

2. Altruism.

3. Acceptance.

4. Mutuality.

Develop skill in utilizing basic principles of the helping process and demonstrate this ability by utilizing the following principles in role play activities in class.

1. Reality.

2. Empathy.

3. Support.

Know those basic values which govern the attitudes and actions of helping persons and demonstrate this knowledge orally by participation in class discussion of the following values:

1. The supreme worth of individuals.

2. The right of a person to:

   a. Be treated as an individual.
   b. Be treated with dignity.
   c. Have opportunity to develop to highest potential.
   d. Have equal opportunity.
   e. Have adequate shelter, education and medical care.

Know the worker's activity in interviewing and demonstrate knowledge by listing and discussing the following activities:

1. Self-awareness and interviewing.

2. Observing and listening.

3. Responding in interviewing.

4. Providing direction and purpose of interview.

Know the principle of confidentiality and demonstrate this knowledge by giving reasons for confidentiality and identifying the worker's responsibility.

At a beginning level in a laboratory situation the student will:

1. Develop the human skills of listening, feeling, caring and understanding the problems and needs of others.

2. Demonstrate two or more techniques for breaking down barriers to communication that will communicate:

    a. The awareness of the student to develop human potential to learn, to continually grow and to become a helping person.
    b. The awareness of the human potential to others to learn, to grow and to help themselves.

BIBLIOGRAPHY

1. Books, Guides and Studies

Articulation of Occupational Education Programs - Instructional Objectives Guide: Program for Executive Secretary - Stenographer. Articulation Research Project sponsored by: Occupational Research Unit, North Carolina Department of Public Instruction, July, 1975, Revised May, 1977.

This guide provides a vehicle for the articulation of subject matter in secretarial programs between high schools and technical institutes/community colleges. It contains: (1) minimum tasks a worker performs in a specific job, (2) primary instructional objectives based upon the tasks, (3) skills and related technical information necessary to accomplish the instructional objectives, (4) instructional contact hours, (5) performance standards, (6) equipment required and (7) performance test items.

Business/Clerical/Sales: Career Education Guide. Washington, D.C.: European Area Dependent Schools, May, 1974 or Current Edition. (Available from ERIC - ED 111 946)

A curriculum guide designed to provide students with realistic learning in business/clerical/sales theory and practices within the secondary educational framework and to prepare them for entry into an occupation or continuing postsecondary education. Each unit plan consists of a description of the area, estimated hours of instruction, behavioral objectives, module outline, list of curriculum materials and resources, laboratory activities and materials.

Curriculum Guide for Clerical Occupations. Secondary Level. Salem, Oregon: The Oregon Board of Education, 1971 or Current Edition.

This occupational cluster guide outlines the basic skills and knowledge necessary for entry-level competencies in clerical occupations or for entrance into a two-year or four-year postsecondary program.

Education for Business: Program Planning Guide and Courses of Study. (Revised Edition) Raleigh: Business and Office Education/Occupational Education, North Carolina Department of Education.

The purpose of this publication is to provide guidelines for administrators, counselors and business teachers which will help them in developing flexible, relevant secondary business programs. These guidelines provide assistance in becoming familiar with career patterns, promoting better articulation between levels of instruction and establishing an understanding of business and office education throughout the total school program.

Erickson, Lawrence W. "Basic Components of Office Work - An Analysis of 300 Office Jobs," Monograph 123. Cincinnati: South-Western Publishing Co., May 1971.

A study based on the New Office and Business Education Learnings System (NOBELS) which involved indepth interviews with 300 office workers and their supervisors in the Los Angeles area (1) to identify and analyze those job components which could be considered basic to most beginning and intermediate levels of office work and (2) to consider the implications of these findings for the business education curriculum.

Huffman, Harry and Dale D. Gust. Business Education for the Emergent Office. Columbus, Ohio: The Center for Vocational and Technical Education, The Ohio State University, June, 1970 (Interim Report).

The major purposes of this document were (1) to identify high-priority, commonly-accepted abilities which are presently emerging and increasing in importance in offices across the United States and (2) to develop general and specific instruction plans which would aid business and office instructors to prepare students for the emergent office. Eighteen general instruction plans were developed. A model for producing additional general and specific instruction plans was developed.

Job Guides for Various Occupations. Order from: New Jersey Department of Labor and Industry, Division of Planning and Research, Trenton, NJ, 08625.

These job guides provide specifics on such things as: (1) information on the nature of work involved in the job, (2) where individual may be employed, (3) type of working conditions to expect, (4) requirements for the job, (5) related occupations, (6) opportunities for advancement, wages and (7) how to qualify for the job.

Lanham, Frank W. and others. Development of Task Performance Statements for a New Office and Business Education Learnings System (NOBELS). Columbus, Ohio: The Center for Vocational and Technical Education, The Ohio State University, September, 1972 (Final Project).

The primary purpose of New Office and Business Education Learnings System was the development of an inventory of 373 educational specifications in behavioral terms that represent basic tasks performed by 16-24 year old office workers. This revised edition is pointed primarily toward the classroom practitioner and curriculum developer in public secondary and community college/technical institute education. The detailed task statements provide a checklist of analyzed performance against which current curriculum or media of instruction can be checked.

Monographs available from South-Western Publishing Co., Cincinnati, Ohio that may be useful as resource and reference materials.

Balsley, Irol W. "Current Transcription Practices in Business Firms," Monograph 130.

Goddard, Merl Lee. "The Potential Role of the Junior College in Education for Business," Monograph C-15.

Harris, E. Edward. "Requirements for Office and Distributive Education Teacher-Coordinators," Monograph 115.

Pullis, Joe M. "Methods of Shorthand Instruction: A Research Analysis," Monograph 126.

Reese, Don and E. Ray Smith. "Shorthand: A Textbook Analysis," Monograph 129.

Roman, John C. "The Business Curriculum," Monograph 100.

"Visual Aids for Business and Economics Education," Monograph 92.

Watson, Frank. "An Analysis of the Business Curriculum." Monograph C-14.

Woolschlager, Ruth B. "Responsibilities of the Business Education Department Chairman," Monograph 120.

Popham, Estelle L. and others. A Teaching-Learning System for Business Education. New York: Gregg Division, McGraw-Hill Book Company, Current Edition.

This book is designed for teacher-trainers, teacher educators and inservice teachers. The competency-based education concept is implemented and concentration is on student achievement and the effectiveness of the teaching-learning system for each student. A practical "how to" manual for teacher-trainers and a valuable reference source for practicing business education teachers and curriculum specialists.

Part I: An Overview of Business Education
Part II: The Teaching-Learning System
Part III: Applications of the Teaching-Learning System

Selden, Jr., William H. and Robert D. Edwards. The Business Education Curriculum. Harrisburg, Pennsylvania: Department of Public Instruction, September, 1966 or Current Edition.

This publication contains many of the latest concepts in the development of a business education curriculum in the secondary school system of Pennsylvania. The publication was developed to to serve as an aid to school administrators and business teachers in organizing and operating business education programs.

Steno-Secretarial Curriculum Guide. Secondary Level. Salem, Oregon: The Oregon Board of Education, 1970 or Current Edition.

This occupational cluster guide outlines the basic skills and knowledge necessary for entry-level competencies in the broad field of stenographic and secretarial occupations or for entrance into a post-high school or university program.

Welker, Jr., L. C. and Clyde N. Ginn. "The Identification of Social Skills Needed in Specific Vocational and Technical Areas and Possible Instructional Approaches Applicable to Such Needs." Hattiesburg, Mississippi: Bureau of Educational Research, University of Southern Mississippi, August, 1974 or Current Edition.

A study of social skills needed and their importance in specific vocational and technical areas. Business and office and marketing and distribution occupations were included in the study. Instructional approaches for social skills needed were also identified. The recommendation for business and office occupations was for instructors to continue to work on social skills in the human relations and personal characteristics categories.

2. Periodicals

Brunson, Evelyn V. "In Support of Competency-Based Education," Business Education World, LV (May-June, 1975), 7-8, 29.

A "pep-talk" article on competency-based education. Views of proponents and opponents of competency-based education are given and the positions analyzed.

Darst, Marian J. "Job Analysis - A Golden Anniversary," The Journal of Business Education, LI (December, 1975), 124-26.

The author describes a study of secretarial duties published over fifty years ago - "Analysis of Secretarial Duties and Traits," by W. W. Charters and Isadore B. Whitley, University of Pittsburgh, published by Williams & Wilkins Company for The National Junior Personnel Service, Inc., in 1924. The uniqueness of this study is the point that their objectives in 1924 were basically the same as some of our studies in business education today: "to determine the duties performed by the secretaries to businessmen and administrators" and then to rank them according to frequency.

Dye, Charles F. "Accountability in Education, A Must," The Journal of Business Education, LI (November, 1975), 58-59.

The author expresses concern of the lack of everyday knowledge for high school graduates. Graduates are not knowledgeable about social security, checking accounts, even though many have one, how to complete a simple, one-page 1040 or 1040A income tax form. Ask question: "Is it possible, in some cases, that we are too concerned with quantity and not enough quality? Measurable competencies need to be established to insure that this need for common knowledge has been fulfilled. The idea of accountability in education is one that must be explored in greater depth and with greater urgency."

Hand, Betsy. "Task Analysis in Developing Performance Objectives," Business Education Forum, XXIX (May, 1975), 12-13.

This article presents a procedure for conducting task analysis. The explanation of task analysis and the Task Analysis Outline were written for use in the training phase of the federally funded Curriculum Development and Computerized Evaluation (CDCE) project at the Metropolitan School District of Washington Township, Indianapolis, Indiana.

Harwood, R. Frank. "Can This Business Profile Help You?" The Journal of Business Education, LI (November, 1975), 75-77.

This article presents a business profile based on the author's study, "Business Occupational Profiles in an Agricultural Economy" (University of Mississippi). Characteristic profile activities, duties, knowledges, skills and understandings were derived from accountants-bookkeepers, office and sales clerks, secretaries-stenographers and administrators/management trainees. Study was based on offering information for analyzing instructors' ideas to improve services to meet students' needs.

Lee, Delene W. "Using Task Analysis to Develop Performance Goals," Business Education Forum, XXX (January, 1976), 15-16.

This article discusses the need for developing performance objectives based on task analyses and the benefits to instructors, students and employers. Discussion of the Vocational-Technical Education Consortium of States (V-TECS) and its role in preparing performance objectives is also included.

Lutz, Barbara K. and Jay P. Lutz. "Competency-Based System for Office Occupations," The Journal of Business Education, LI (April, 1976), 319-21.

An explanation of the competency-based program entitled "Directed Office Occupational Experience" used at Florida State University in the training of teachers. The process of development includes: (1) a set of assumptions which function as a rationale for the competency-based management system, (2) the specific competency objectives expected to be successfully completed by each participant and (3) a process of negotiation as a means of helping participants to achieve office-related competencies.

Popham, Estelle L. "Making Business Education Meaningful with A Competency-Based Curriculum," Business Education World, LV (May-June, 1975) 5-6, 29.

Several questions are asked and remarks to each given. What is competency-based education? What can be done to ensure that a curriculum is competency-based? How are performance goals expressed? How can instructors be sure goals are met by students? Remarks on implementation of competency-based education and how it works and what it involves are also given.

Prigge, Lila L. "Specialized Programs in Office Occupations," The Journal of Business Education, LI (April, 1976), 311-13.

The author describes twelve specialized office occupations offered at 916 Area Vocational Technical Institute, East Grand Forks, Minnesota. Programs include: Accounting, Banking/Finance, Clerk-Stenographer, General Office Clerk, Educational Office, Electronic Data Processing, Insurance Office, Law Enforcement Office, Legal Office, Medical Office, Purchasing and Traffic. Each program consists of courses from a core of related courses and courses in the specialized area. Each program maintains an active advisory committee. Programs offered on individual basis.

"Review of Research on Individualized Instruction," Business Education Forum, XXX (January, 1976), 29-37.

The author of this section of the Business Education Forum reviewed the research related to individualized instruction over the past five to ten years and reported a representative sample of the findings. Their accounts are based on findings reported in dissertation abstracts and various business and economic education periodicals. The individualized instruction courses include: (1) typewriting, (2) shorthand, (3) bookkeeping, (4) accounting, (5) business mathematics, (6) economics, (7) business communications and (8) basic business.

Schatz, Anne E. "Open Classroom for Business Careers," The Journal of Business Education, LI (November, 1975), 78-79.

A description of Mt. San Jacinto College's (San Jacinto, CA 92383) Open Classroom Concept. In 1973, the Business Careers Department incorporated into one program the features of prescriptive education, learning to mastery, program needs assessment, partial credit and open entry/exit.

Tilton, Rita Sloan. "The Block Time Teacher is a Manager," The Journal of Business Education, LI (January, 1976), 162-165.

A description of the role of the block time secondary business teacher when using Management by Objectives (MBO) concept. A discussion of strategic planning, performance standards, job (program) improvement plan, proper environment for success, self and job (program) evaluation management development. The article emphasizes the fact that MBO is applicable to any area.

Tonne, Herbert A. "Education for the New Office Environment," The Journal of Business Education, LI (December, 1975), 106-107.

This article discusses the clerical occupation and the implications for clerical training in the schools. The author emphasizes the need for the student not to have only the basic skills for entrance into office life, but the need for more general skills also.

3. Reference Materials

Aubrey, Ruth H. Selected Free Materials for Classroom Teachers. Palo Alto, California: Fearon Publishers, Current Edition.

This book provides a carefully screened, precisely annotated listing of free materials. Over 570 up-to-date sources of free classroom materials - thousands of items chosen, graded and annotated by a panel of leading educators are listed.

Fisk, Margaret (ed.). Encyclopedia of Associations. Volume 1. National Organizations of the United States. Detroit: Gale Research Co., Current Edition.

This encyclopedia is the only major source of detailed information concerning nonprofit American membership organizations of national scope. Information concerning the location, size, objectives and many other essential aspects of several thousand trade associations, professional societies, labor unions, fraternal and patriotic organizations and other types of groups consisting of voluntary members are listed.

Hill, Richard K. and B. June Schmidt (eds.). Behavioral Objectives for Selected Units in Business Education. Richmond, Virginia: Public Information and Publications, State Department of Education, Current Edition.

This publication is a catalogue of behavioral objectives organized by units primarily for secondary business education teachers. Each unit contains an outline of the content, a goal statement and general and specific objectives. The 48 units included topics such as: business law, business mathematics, money management, recordkeeping, typewriting, secretarial procedures and practices, etc.

Mapp, Edward. Books for Occupational Education Programs: A List for Community Colleges, Technical Institutes and Vocational Schools. New York: R. R. Bowker Company, Current Edition.

This guide will be useful in developing library collections and updating existing collections in career-oriented educational institutions. The list includes trade books, reference works, handbooks, texts, curriculum guides, continuations and other relevant titles of twenty-five pages or more currently used in career training. Periodicals and other non-book media are not included. Subjects covered represent standard curricula in community colleges and other career-technical-vocational institutions. Each entry includes author, title, subtitle, edition, publisher, main pagination or number of volumes and illustration or series note.

Pepe, Thomas J. Free and Inexpensive Educational Aides. New York: Dover Publications, Inc., Current Edition.

This book serves as a source of known, available educational material. It lists over 1700 books, films, folders, charts, posters, slides, booklets - 88 percent are free, 9 percent are less than 25 cents.

Review Western Tape Catalogue for audiovisual aids in Typewriting, Word Processing, Shorthand, General Office Skills and General Business and Materials from International Business Machines (IBM). (Guides to punctuation and proper grammar usage are also available on request - complementary copies.) For information write or call: Western Tape, P. O. Box 69, Mountain View, CA, 94042, (415) 969-0371.

Schuman, Patricia. Materials for Occupational Education: An Annotated Source Guide. New York: R. R. Bowker Company, Current Edition.
This source guide lists approximately 600 organizations which supply books, periodicals, manuals and multimedia aids for 63 occupational areas.

Special Packages: Instructional Resources for Vocational Education. Competency-Based Business Education Modules.
This "Special Packages Project" is designed to assist vocational educators - secondary and postsecondary - in developing skills to evaluate and adapt instructional resources related to growing and developing occupations. This package contains four units dealing with interpersonal skills and an annotated bibliography, "Job Seeking - Job Keeping." A complete set of 120 modules is available from Wisconsin Vocational Studies Center.
For more information on "Special Packages" write or call: Program Information Office, National Center for Research in Vocational Education, 1960 Kenny Road, Columbus, OH, 43210.

Wasserman, Paul and others. Encyclopedia of Business Information Sources. Detroit, Michigan: Gale Research Company.
The encyclopedia provides a detailed listing of primary subjects of interest to managerial personnel, with a record of sourcebooks, periodicals, organizations, directories, handbooks, bibliographies and other sources of information on each topic.

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APPENDIX B-1

Introductory Letter

DEPARTMENT OF
COMMUNITY COLLEGES
NORTH CAROLINA STATE BOARD OF EDUCATION
RALEIGH 27611

September 14, 1976

TO: Secretarial Science Coordinator

FROM:

R. Jean Overton
Assistant Director
Program Development Division
Department of Community Colleges

Mrs. Katharine B. Meadows
Consultant
Business & Office Education
Department of Public Instruction

The Department of Community Colleges is conducting a project to determine the competencies required by employers for successful employment on the job. This project is designed to provide: (1) a validated list of career opportunities and the tasks performed by employees in a given job; (2) a list of competencies and evaluated criteria essential to successfully perform in the job; (3) curriculum guidelines and (4) curriculum materials based on the competencies.

As a part of the continuous articulation efforts of the Program Development and Business and Office Education staffs, we are attempting to determine what portion of the competency-based business and office education information and materials that have been developed can best be utilized in this project. We are asking for your assistance in determining employment opportunities in business and office occupations. The enclosed form identifies possible careers open to individuals in this area. These opportunities may or may not exist. Your response to the survey will contribute to the identification of jobs that do exist. Please complete one of these forms and have your advisory committee chairperson and/or committee to complete the other.

After you have completed the survey, please return it in the stamped, self-addressed envelope on or before Friday, October 1. Your responses will be compiled with the responses of other individuals completing the survey, with no individual responses identified.

Your participation is appreciated.

bs

Enclosures

APPENDIX B-2

Career Opportunity Survey Form

CAREER OPPORTUNITY SURVEY

The following employment opportunities have been identified by the United States Office of Education as being careers open to individuals in office occupations (secretarial and general office). These opportunities may or may not exist in North Carolina.

Please indicate your opinion as to whether these employment opportunities do exist in our state by checking (✓) the yes or no block next to the career identified. Also, indicate your opinion as to the level(s) at which this training should be available. Add any additional career opportunities which exist in North Carolina and other comments on the back of each sheet.

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	MACHINE OPERATORS: BILLING,					
	BOOKKEEPING, AND COMPUTING					
214.488-010	Billing-Machine Operator					
215.388-010	Bookkeeping-Machine Operator I					
215.388-014	Bookkeeping-Machine Operator II					
215.488-010	Payroll Clerk					
216.388-010	Balance Clerk					
216.388-014	Bank-Reconciliation Clerk					
216.488-010	Adding-Machine Operator					
216.488-014	Audit-Machine Operator					
216.488-018	Calculating-Machine Operator					
216.588-014	Integrator Operator					
217.885-010	Bursting-Machine Operator					
	ACCOUNTING AND COMPUTING OCCUPA-					
	TIONS, OTHER					
219.138-042	Chief Timekeeper					
	BUSINESS DATA PROCESSING SYSTEMS					
	OCCUPATIONS					
213.138-014	Machine Records Unit Supervisor					
	KEY PUNCH AND CODING EQUIPMENT					
	OPERATORS					
213.582-010	Key-Punch Operator					

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	KEY PUNCH AND CODING EQUIPMENT					
	OPERATORS (continued)					
213.588-010	Data Typist					
213.588-014	Verifier Operator					
213.782-010	Tabulating-Machine Operator					
213.885-010	Sorting-Machine Operator					
	DUPLICATING MACHINE OPERATORS					
207.138-010	Print Shop Chief Clerk					
207.582-010	Braille-Duplicating-Machine					
	Operator					
207.782-014	Duplicating-Machine Operator II					
207.782-018	Duplicating-Machine Operator III					
207.782-022	Mimeograph Operator					
207.782-026	Offset-Duplicating-Machine					
	Operator					
207.782-030	Automatic Typewriter Operator					
207.884-010	Duplicating-Machine Operator I					
207-885-010	Duplicating-Machine Operator IV					
207.885-014	Photographic-Machine Operator					
207.885-018	Stencil-Cutter Operator					
	FILE CLERKS					
206.388-010	Classification Clerk					
206.388-018	File Clerk I					
206.388-022	File Clerk II					
206.388-034	Record Clerk II					
	GENERAL OFFICE CLERKS	150				
219.388-026	Billing Clerk II					

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	GENERAL OFFICE CLERKS (continued)					
219.388-038	Budget Clerk					
219.388-042	C.O.D. Clerk					
219.388-066	General Office Clerk					
219.388-074	Coding Clerk					
219.388-114	District Clerk					
219.388-146	Insurance Clerk I					
219.388-182	Mortgage-Accounting Clerk					
219.388-190	Paymaster					
219.388-222	Real Estate Clerk					
219.388-258	Statistical Clerk					
219.388-270	Tax Clerk I					
219.388-278	Traffic-Rate Clerk					
219.488-010	Accounting Clerk					
219.488-018	Advertising-Space Measurer					
219.488-034	Cost Clerk					
219.488-046	Foreign Clerk					
219.585-010	Coin-Machine Operator					
219.588-014	Charge-Refer Clerk					
219.588-026	Error-Ledger Clerk					
219.588-030	Kardex Clerk					
219.588-038	Posting Clerk					
	FILING, OFFICE MACHINES, AND					
	GENERAL OFFICE CLERICAL OCCU					
	PATIONS, OTHER					
208.138-010	Head Transcribing Operator					
208.588-014	Cryptographic-Machine Operator					

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	FILING, OFFICE MACHINES, AND					
	GENERAL OFFICE CLERICAL OCCU-					
	PATIONS, OTHERS (continued)					
208.588-022	Telautograph Operator					
208.588-026	Transcribing Machine Operator					
208.782-010	Embossing-Machine Operator I					
208.782-014	Embossing-Machine Operator II					
208.782-022	Ticket-Machine Operator					
208.885-014	Microfilm Mounter					
209.138-014	Stenographic-Pool Supervisor					
209.368-010	Call-Out Operator					
209.368-014	Evaluator					
209.368-018	In-File Operator					
209.388-034	Mortgage-Processing Clerk					
209.488-018	Invoice-Control Clerk					
209.584-010	Morticer					
209.588-010	Addresser					
209.588-018	General Clerk					
209.588-026	Copy Holder					
209.588-034	Customer-Control Clerk					
209.588-050	Price Clerk					
209.687-010	Address-Plate Inserter					
209.687-014	Slip Puller					
209.688-014	Checker II					
209.688-030	Order Caller					
209.688-042	Sorter					
209.688-046	Weight Caller					

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	CORRESPONDENCE CLERKS					
204.288-010	Correspondence Clerk					
204.388-010	Correspondence-Review Clerk					
	RECEPTIONISTS AND INFORMATION CLERKS					
237.368-010	Admitting Officer I					
237.368-014	Appointment Clerk					
237.368-018	Hospital-Admitting Clerk					
237.368-022	Information Clerk					
237.368-030	Out-Patient Admitting Clerk					
237.368-034	Pay-Station Attendant					
237.368-038	Receptionist					
	INTERVIEWERS AND TEST TECHNICIANS					
249.368-090	Test Technician					
	PERSONNEL ASSISTANTS					
166.168-010	Benefits-And-Service-Records					
	Supervisor					
205.138-010	Personnel Clerk Supervisor					
205.368-014	Employment Clerk					
205.368-026	Personnel Clerk					
205.368-018	Identification Clerk					
205.368-030	Social Security Clerk					
205.388-010	Civil-Service Clerk					
	EXECUTIVE SECRETARY					
169.168-018	Administrative Secretary					
	SECRETARIES					
201.268-010	Social Secretary					
201.368-010	Legal Secretary					

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	SECRETARIES (continued)					
201.368-014	Medical Secretary					
201.368-018	Secretary					
	STENOGRAPHERS					
202.388-010	Court Reporter					
202.388-014	Stenographer					
202.388-022	Stenotype Operator					
	ADMINISTRATIVE ASSISTANTS					
169.168-014	Administrative Assistant					
	OFFICE MANAGERS AND CHIEF CLERKS					
169.168-026	Chief Clerk					
169.168-062	Office Manager					
	CLERK-TYPISTS					
209.388-022	Clerk-Typist					
	TYPISTS					
203.138-010	Chief Telegraphic-Typewriter					
	Operator					
203.138-014	Typing Section Chief					
203.582-014	Vari-Typist					
203.588-014	Telegraphic-Typewriter Operator					
203.588-018	Typist					
203.588-010	Perforator Typist					

Please indicate areas represented:

Business _____

Education _____

Other _____

Geographic Region: _____

APPENDIX B-3

Career Opportunity Survey Results

CAREER OPPORTUNITY
SURVEY

The following employment opportunities have been identified by the United States Office of Education as being careers open to individuals in office occupations (secretarial and general office). These opportunities may or may not exist in North Carolina.

Please indicate your opinion as to whether these employment opportunities do exist in our state by checking (✓) the yes or no block next to the career identified. Also, indicate your opinion as to the level(s) at which this training should be available. Add any additional career opportunities which exist in North Carolina and other comments on the back of each sheet.

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	MACHINE OPERATORS: BILLING,					
	BOOKKEEPING, AND COMPUTING					
214.488-010	Billing-Machine Operator				18	
215.388-010	Bookkeeping-Machine Operator I					
215.388-014	Bookkeeping-Machine Operator II				20	
215.488-010	Payroll Clerk			16		24
216.388-010	Balance Clerk					
216.388-014	Bank-Reconciliation Clerk			16		
216.488-010	Adding-Machine Operator			20		16
216.488-014	Audit-Machine Operator				15	
216.488-018	Calculating-Machine Operator			16		17
216.588-014	Integrator Operator					
217.885-010	Bursting-Machine Operator					
	ACCOUNTING AND COMPUTING OCCUPA-					
	TIONS, OTHER					
219.138-042	Chief Timekeeper				15	
	BUSINESS DATA PROCESSING SYSTEMS					
	OCCUPATIONS					
213.138-014	Machine Records Unit Supervisor				22	
	KEY PUNCH AND CODING EQUIPMENT					
	OPERATORS					
213.582-010	Key-Punch Operator				20	17

156

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	KEY PUNCH AND CODING EQUIPMENT					
	OPERATORS (continued)					
213.588-010	Data Typist					27
213.588-014	Verifier Operator				21	
213.782-010	Tabulating-Machine Operator				18	
213.885-010	Sorting-Machine Operator				18	
	DUPLICATING MACHINE OPERATORS					
207.138-010	Print Shop Chief Clerk				20	
207.582-010	Braille-Duplicating-Machine					
	Operator					
207.782-014	Duplicating-Machine Operator II					16
207.782-018	Duplicating-Machine Operator III					16
207.782-022	Mimeograph Operator			16		
207.782-026	Offset-Duplicating-Machine					
	Operator				18	15
207.782-030	Automatic Typewriter Operator					21
207.884-010	Duplicating-Machine Operator I			18		
207-885-010	Duplicating-Machine Operator IV					
207.885-014	Photographic-Machine Operator					
207.885-018	Stencil-Cutter Operator					
	FILE CLERKS					
206.388-010	Classification Clerk					
206.388-018	File Clerk I			25		16
206.388-022	File Clerk II			15		15
206.388-034	Record Clerk II					
	GENERAL OFFICE CLERKS					
219.388-026	Billing Clerk II					17

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	GENERAL OFFICE CLERKS (continued)					
219.388-038	Budget Clerk					
219.388-042	C.O.D. Clerk					
219.388-066	General Office Clerk			16		26
219.388-074	Coding Clerk					
219.388-114	District Clerk					
219.388-146	Insurance Clerk I				17	
219.388-182	Mortgage-Accounting Clerk				21	
219.388-190	Paymaster					
219.388-222	Real Estate Clerk				20	
219.388-258	Statistical Clerk				20	
219.388-270	Tax Clerk I				20	
219.388-278	Traffic-Rate Clerk				16	
219.488-010	Accounting Clerk					22
219.488-018	Advertising-Space Measurer					
219.488-034	Cost Clerk				18	
219.488-046	Foreign Clerk					
219.585-010	Coin-Machine Operator					
219.588-014	Charge-Refer Clerk					
219.588-026	Error-Ledger Clerk					
219.588-030	Kardex Clerk					
219.588-038	Posting Clerk					17
	FILING, OFFICE MACHINES, AND					
	GENERAL OFFICE CLERICAL OCCU					
	PATIONS, OTHER					
208.138-010	Head Transcribing Operator					17
208.588-014	Cryptographic-Machine Operator					

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	FILING, OFFICE MACHINES, AND					
	GENERAL OFFICE CLERICAL OCCU-					
	PATIONS, OTHERS (continued)					
208.588-022	Telautograph Operator					
208.588-026	Transcribing Machine Operator					27
208.782-010	Embossing-Machine Operator I					
208.782-014	Embossing-Machine Operator II					
208.782-022	Ticket-Machine Operator					
208.885-014	Microfilm Mounter				15	
209.138-014	Stenographic-Pool Supervisor				27	
209.368-010	Call-Out Operator					
209.368-014	Evaluator					
209.368-018	In-File Operator					
209.388-034	Mortgage-Processing Clerk				19	
209.488-018	Invoice-Control Clerk					
209.584-010	Morticer					
209.588-010	Addresser					
209.588-018	General Clerk					24
209.588-026	Copy Holder					
209.588-034	Customer-Control Clerk					
209.588-050	Price Clerk					
209.687-010	Address-Plate Inserter					
209.687-014	Slip Puller					
209.688-014	Checker II					
209.688-030	Order Caller					
209.688-042	Sorter					
209.688-046	Weight Caller					

159

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	CORRESPONDENCE CLERKS					
204.288-010	Correspondence Clerk					22
204.388-010	Correspondence-Review Clerk					
	RECEPTIONISTS AND INFORMATION CLERKS					
237.368-010	Admitting Officer I					
237.368-014	Appointment Clerk			15		17
237.368-018	Hospital-Admitting Clerk					
237.368-022	Information Clerk					
237.368-030	Out-Patient Admitting Clerk				15	
237.368-034	Pay-Station Attendant					
237.368-038	Receptionist					29
	INTERVIEWERS AND TEST TECHNICIANS					
249.368-090	Test Technician				25	
	PERSONNEL ASSISTANTS					
166.168-010	Benefits-And-Service-Records					
	Supervisor				17	
205.138-010	Personnel Clerk Supervisor				24	
205.368-014	Employment Clerk				17	
205.368-026	Personnel Clerk				17	17
205.368-018	Identification Clerk					
205.368-030	Social Security Clerk				13	
205.388-010	Civil-Service Clerk					
	EXECUTIVE SECRETARY					
169.168-018	Administrative Secretary				23	23
	SECRETARIES					
201.268-010	Social Secretary					16
201.368-010	Legal Secretary				21	25

D.O.T. Code	Occupational Title	Career Opportunity		Where Training Should Be Available		
		Yes	No	High School	Com. Col. Tech. Inst.	Both
	SECRETARIES (continued)					
201.368-014	Medical Secretary					20
201.368-018	Secretary				25	36
	STENOGRAPHERS					
202.388-010	Court Reporter					36
202.388-014	Stenographer					30
202.388-022	Stenotype Operator				29	
	ADMINISTRATIVE ASSISTANTS					
169.168-014	Administrative Assistant				28	
	OFFICE MANAGERS AND CHIEF CLERKS					
169.168-026	Chief Clerk				20	
169.168-062	Office Manager				24	
	CLERK-TYPISTS					
209.388-022	Clerk-Typist			17		29
	TYPISTS					
203.138-010	Chief Telegraphic-Typewriter					
	Operator				17	
203.138-014	Typing Section Chief					
203.582-014	Vari-Typist					
203.588-014	Telegraphic-Typewriter Operator					
203.588-018	Typist			15		22
203.588-010	Perforator Typist					

Please indicate areas represented:

Business 21

Education 25

Other 3 No indication

Geographic Region:

161

APPENDIX C-1

NOBELS Task Survey by Job

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

	Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
01. NUMERICAL CLERICAL RECORDS																				
01.01. Accounts Receivable																				
01.01.01 The worker types invoices from such documents as sales tickets, contracts, and receiving reports. (59 task sheets, detail)																				
01.01.02 The worker records accounts receivables from such documents as salesmen's orders, cash receipts, and invoices. (48 task sheets, detail)																				
01.01.03 The worker prepares billings of sales. (41 task sheets, detail)																				
01.01.04 The worker writes delinquent customer. (27 task sheets, detail)																				
01.01.05 The worker verifies customer's account receivable. (18 task sheets, detail)																				
01.01.06 The worker completes medical charges for insurance reimbursement. (15 task sheets, detail)																				
01.01.07 The worker completes sales reports. (12 task sheets, detail)																				
01.01.08 The worker prepares statements from patient's accounts and charge slips. (8 task sheets, detail)																				
01.01.09 The worker calls delinquent customers. (4 task sheets, semi-detail)																				
01.01.10 The worker processes changes in status of account. (2 task sheets, semi-detail)																				
01.01.11 The worker requests payment from delinquent patients. (2 task sheets, semi-detail)																				
01.01.12 The worker processes follow-up records of patient's visit. (1 task sheet, semi-detail)																				
01.02. Accounts Payable																				
01.02.01 The worker computes accounts payables from source documents. (69 task sheets, detail)																				
01.02.02 The worker records accounts payables. (47 task sheets, detail)																				
01.02.03 The worker prepares payments from documents such as invoices, bills, and vouchers. (33 task sheets, detail)																				
01.03. Payroll																				
01.03.01 The worker prepares payroll. (73 task sheets, detail)																				
01.03.02 The worker records payroll information. (27 task sheets, detail)																				
01.03.03 The worker computes payroll changes. (17 task sheets, detail)																				
01.03.04 The worker compiles payroll reports from payroll sheets, time sheets, job cards, and printouts. (15 task sheets, detail)																				
01.03.05 The worker punches payroll data. (8 task sheets, semi-detail)																				

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

		Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing
01.03.06	The worker records payroll changes for hospital employees. (2 task sheets, semi-detail)																			
01.03.07	The worker prepares a dummy payroll. (1 task sheet, semi-detail)																			
01.03.08	The worker computes salesmen's commission. (1 task sheet, semi-detail)																			
01.03.09	The worker prepares time cards. (1 task sheet, semi-detail)																			
01.03.10	The worker updates weekly payroll time cards. (1 task sheet, semi-detail)																			
01.03.11	The worker maintains records of time spent developing new products from weekly activity tickets. (1 task sheet, semi-detail)																			
01.03.12	The worker processes status time slips. (1 task sheet, semi-detail)																			
01.03.13	The worker compiles an employee transfer list from output cards. (1 task sheet, semi-detail)																			
01.04.	Computing and Checking																			
01.04.01	The worker checks the accuracy of source documents such as sales, purchasing, tax reports, and forms. (28 task sheets, detail)																			
01.04.02	The worker verifies totals of cancelled checks, computer tapes, and tellers' balance sheets. (21 task sheets, detail)																			
01.04.03	The worker verifies cash receipts for deposit. (18 task sheets, detail)																			
01.04.04	The worker performs routine check on such items as deposit slips, adding machine tapes, and advices. (15 task sheets, detail)																			
01.04.05	The worker corrects checks, savings and withdrawal slips, balance sheets, and other source documents. (12 task sheets, detail)																			
01.04.06	The worker checks computations with proofing machine. (8 task sheets, detail)																			
01.04.07	The worker distributes daily cash to tellers in branch banks. (2 task sheets, semi-detail)																			
01.04.08	The worker sorts coins from the federal reserve bank daily. (2 task sheets, semi-detail)																			
01.04.09	The worker verifies installment loan balances. (1 task sheet, semi-detail)																			
01.04.10	The worker prepares night deposits. (1 task sheet, semi-detail)																			
01.04.11	The worker performs audit of particular functions in individual departments of the bank. (1 task sheet, semi-detail)																			
01.04.12	The worker codes transaction tax on tickets. (1 task sheet)																			

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

	Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
01.05. Receipts																				
01.05.01 The worker prepares the bank deposit from cash receipts. (17 task sheets, detail)																				
01.05.02 The worker receives payments over the counter. (20 task sheets, detail)																				
01.05.03 The worker records payments received. (17 task sheets, detail)																				
01.05.04 The worker records payments for medical services. (16 task sheets, detail)																				
01.05.05 The worker records deposits to customer accounts. (12 task sheets, detail)																				
01.05.06 The worker prepares reconciliation of bank account. (8 task sheets, detail)																				
01.05.07 The worker processes money for library books and films from check-out requests and late and lost book notices. (3 task sheets, semi-detail)																				
01.05.08 The worker performs bookkeeping duties of a small bank. (1 task sheet, semi-detail)																				
01.06. Financial Entries																				
01.06.01 The worker records data for financial reports from schedules, license fee forms, and damage claims. (28 task sheets, detail)																				
01.06.02 The worker prepares financial reports. (26 task sheets, detail)																				
01.06.03 The worker records items such as stocks, bonds, deposit slips, and passbooks. (18 task sheets, detail)																				
01.06.04 The worker records receipts and withdrawals in the ledger. (13 task sheets, detail)																				
01.06.05 The worker records loan payment reversing entries. (1 task sheet, semi-detail)																				
01.06.06 The worker records monies received for or spent from internal accounts. (1 task sheet, semi-detail)																				
01.06.07 The worker adjusts property tax records from transfer forms. (1 task sheet, semi-detail)																				
01.07. Cost Accounting																				
01.07.01 The worker compiles unit costs of jobs and sales/production estimates from expense sheets and/or total sales figures. (33 task sheets, detail)																				

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

		Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
01.07.02	The worker prepares bids and cost estimates of products and services. (12 task sheets, semi-detail)																				
01.07.03	The worker compiles variance reports from actual and standard cost figures. (7 task sheets, semi-detail)																				
01.07.04	The worker types cost analysis reports. (4 task sheets, semi-detail)																				
01.07.05	The worker determines cost estimates by observing production and scanning blueprints. (2 task sheets, semi-detail)																				
01.07.06	The worker compiles relevant statistics and determines improvements in methods by submitting cost analysis of proposed changes. (2 task sheets)																				
01.07.07	The worker processes new accrual accounts from current cost analyses and additional specifications. (2 task sheets)																				
01.08.	Credit																				
01.08.01	The worker processes credit applications. (17 task sheets, detail)																				
01.08.02	The worker verifies customer credit. (8 task sheets, detail)																				
01.08.03	The worker processes credit information. (8 task sheets, semi-detail)																				
01.08.04	The worker informs applicant and company department of approved/rejected credit applications. (7 task sheets, detail)																				
01.08.05	The worker processes credit memorandums. (5 task sheets, detail)																				
01.08.06	The worker processes credit information request. (3 task sheets, detail)																				
01.08.07	The worker answers charge account billing inquiries. (2 task sheets, semi-detail)																				
01.08.08	The worker updates delinquent account lists. (1 task sheet)																				
01.08.09	The worker determines extension of additional credit. (1 task sheet, semi-detail)																				
01.08.10	The worker compiles delinquent receipts report from a computer printout, amounts of paper sold, and cash receipts. (1 task sheet)																				
01.08.11	The worker verifies wire request of amount due a customer. (1 task sheet)																				
01.09.	Disbursements																				
01.09.01	The worker prepares disbursements from customer accounts. (12 task sheets, semi-detail)																				
01.09.02	The worker prepares disbursement of funds. (11 task sheets, detail)																				
01.09.03	The worker prepares disbursement of petty cash funds. (4 task sheets, semi-detail)																				

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

	Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
02. INTERNAL SERVICES																				
02.01. Mailing																				
02.01.01 The worker processes departmental incoming mail. (99 task sheets, detail)																				
02.01.02 The worker prepares daily bulk mailings. (28 task sheets, semi-detail)																				
02.01.03 The worker sorts materials such as invoices, purchase orders, statements, checks, and contracts. (25 task sheets)																				
02.01.04 The worker processes company outgoing mail. (22 task sheets, semi-detail)																				
02.01.05 The worker performs mailroom duties. (19 task sheets, semi-detail)																				
02.01.06 The worker operates an addressing machine. (16 task sheets, semi-detail)																				
02.01.07 The worker delivers incoming and outgoing mail. (16 task sheets, semi-detail)																				
02.01.08 The worker delivers materials such as supplies, blueprints, and product samples. (12 task sheets, semi-detail)																				
02.01.09 The worker processes incoming mail such as bank forms and checks. (11 task sheets, detail)																				
02.01.10 The worker processes incoming hospital mail. (9 task sheets, detail)																				
02.01.11 The worker arranges routing of publications. (8 task sheets)																				
02.01.12 The worker delivers mail/account documents to the post office company branches. (7 task sheets)																				
02.01.13 The worker processes requests for standard product information. (6 task sheets)																				
02.01.14 The worker processes departmental outgoing mail. (6 task sheets, semi-detail)																				
02.01.15 The worker processes certified, special delivery, and registered mail. (6 task sheets, semi-detail)																				
02.01.16 The worker processes interoffice mail. (6 task sheets)																				
02.01.17 The worker packages items for mailing. (5 task sheets)																				
02.01.18 The worker attaches incoming mail to files for processing. (4 task sheets)																				
02.01.19 The worker checks envelopes for additional contents with scanner. (1 task sheet)																				
02.01.20 The worker delivers batches of transactions to the vault area. (1 task sheet)																				

JOB COMPETENCY

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02.02. Filing																				
02.02.01 The worker processes requests for records or files. (120 task sheets, detail)																				
02.02.02 The worker updates files. (43 task sheets, semi-detail)																				
02.02.03 The worker files materials such as legal, personnel, and purchasing documents. (41 task sheets, simi-detail)																				
02.02.04 The worker processes materials for filing such as legal, personnel, and real estate documents. (35 task sheets, semi-detail)																				
02.02.05 The worker arranges ledger cards for filing or further processing. (6 task sheets, semi-detail)																				
02.02.06 The worker updates the central index files. (4 task sheets, semi-detail)																				
02.03. Non-Computational Recording																				
02.03.01 The worker compiles reports and documents from sources such as supply lists, invoices, and outlines. (30 task sheets, detail)																				
02.03.02 The worker updates records and patient charts from lab reports, case histories, and other information. (28 task sheets, detail)																				
02.03.03 The worker updates records, schedules, and manuals. (19 task sheets, detail)																				
02.03.04 The worker corrects printouts, forms, and stencils. (19 task sheets, detail)																				
02.03.05 The worker corrects names on loan files, bank records, and insurance policies from deeds or death certificates. (1 task sheet)																				
02.04. Duplicating																				
02.04.01 The worker prepares duplicated materials. (46 task sheets, semi-detail)																				
02.04.02 The worker duplicates file materials. (42 task sheets, detail)																				
02.04.03 The worker duplicates items for permanent records. (9 task sheets, detail)																				
03. TYPING COMMUNICATION																				
03.00.01 The worker types correspondence, memos, and other items from form and rough draft required by employer. (226 task sheets, detail)																				
03.00.02 The worker types dictation from shorthand. (172 task sheets, detail)																				
03.00.03 The worker types communications from dictated belt. (46 task sheets, detail)																				
03.00.04 The worker types reports from rough drafts. (43 task sheets, detail)																				
03.00.05 The worker types medical letters, forms, articles, and reports. (38 task sheets, detail)																				

JOB COMPETENCY

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03.00.06	The worker types statistical information from engineering specifications, lists of checks, and rate sheets. (25 task sheets, detail)																				
03.00.07	The worker operates a teletype machine. (19 task sheets, detail)																				
03.00.08	The worker answers requests by typed letters. (17 task sheets, semi-detail)																				
03.00.09	The worker types information on forms, cards, or letterheads from dictation, applications, computer listings, and other source documents. (17 task sheets, detail)																				
03.00.10	The worker types reports/bulletins from rough drafts and lists. (14 task sheets, detail)																				
03.00.11	The worker processes rough draft to duplicated material. (13 task sheets, detail)																				
03.00.12	The worker types addresses on labels/envelopes. (8 task sheets, semi-detail)																				
03.00.13	The worker prepares radio commercials from oral instructions. (2 task sheets, semi-detail)																				
03.00.14	The worker prepares translation of incoming/outgoing Spanish mail. (1 task sheet)																				
03.00.15	The worker sends telegrams. (1 task sheet, semi-detail)																				
	04. CLIENT RELATED SERVICES																				
	04.01. Insurance																				
04.01.01	The worker types insurance documents. (48 task sheets, detail)																				
04.01.02	The worker processes insurance inquiries. (41 task sheets, detail)																				
04.01.03	The worker processes insurance claims. (20 task sheets, detail)																				
04.01.04	The worker prepares reports of new business activity. (2 task sheets, semi-detail)																				
04.01.05	The worker duplicates claim stickers for insurance policy holders. (1 task sheet, semi-detail)																				
04.01.06	The worker processes auto club membership applications. (1 task sheet, semi-detail)																				
	04.02. Financial																				
04.02.01	The worker processes over-the-counter requests and inquiries. (26 task sheets, detail)																				
04.02.02	The worker processes membership and loan applications in financial institutions such as a credit union. (17 task sheets, detail)																				
04.02.03	The worker processes new accounts, transfers of accounts, and trust accounts for customers. (8 task sheets, detail)																				
04.02.04	The worker prepares all stop payments. (5 task sheets, semi-detail)																				

JOB COMPETENCY

Please examine each competency to determine knowledges, attitudes and skills and check (✓) appropriate column.

		Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
04.02.05	The worker checks securities and amounts. (4 task sheets, semi-detail)																				
04.02.06	The worker processes estate settlements for customers. (3 task sheets, detail)																				
04.02.07	The worker prepares applications for vendor's single interest (VSI) insurance coverage. (2 task sheets, semi-detail)																				
04.02.08	The worker administers safety deposit boxes. (2 task sheets, semi-detail)																				
04.02.09	The worker checks claims for transfer, trade, or exchange of securities. (2 task sheets, semi-detail)																				
04.02.10	The worker compiles broker's daily exchange summary sheets. (2 task sheets)																				
04.02.11	The worker processes settlement of buy and sell orders. (2 task sheets, semi-detail)																				
04.02.12	The worker issues payment to utility companies for bills paid at bank. (1 task sheet, semi-detail)																				
04.02.13	The worker issues receipts for securities. (1 task sheet)																				
04.02.14	The worker checks numbers and amounts of securities. (1 task sheet)																				
04.02.15	The worker processes stock transactions to be delivered to another broker. (1 task sheet, semi-detail)																				
04.02.16	The worker processes trading in municipal bonds. (1 task sheet, semi-detail)																				
04.02.17	The worker processes outgoing cash letters in foreign currency. (1 task sheet, semi-detail)																				
04.02.18	The worker processes incoming cash letters from foreign correspondent banks. (1 task sheet, semi-detail)																				
04.02.19	The worker processes assumptions of loans on request for beneficiary statement indicating a prospective buyer. (1 task sheet, semi-detail)																				
04.02.20	The worker prepares currency for shipping orders. (1 task sheet, semi-detail)																				
04.02.21	The worker informs customers that payments made by bank to insurance company have been returned. (1 task sheet)																				
04.02.22	The worker types insurance cancellation letters. (1 task sheet, semi-detail)																				
04.02.23	The worker verifies insurance coverage and registration of the bank as legal owner of all auto installment loans. (1 task sheet, semi-detail)																				
04.02.24	The worker prepares customer payroll schedule. (1 task sheet, semi-detail)																				
04[redacted]	The worker checks errors for large corporations. (1 task sheet, semi-detail)																				

JOB COMPETENCY

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04.02.26 The worker issues savings certificates. (1 task sheet, semi-detail)																				
04.02.27 The worker processes savings certificates to be redeemed. (1 task sheet, semi-detail)																				
04.02.28 The worker prepares travelers checks for customers. (1 task sheet, semi-detail)																				
04.02.29 The worker prepares Christmas club coupons for customers. (1 task sheet, semi-detail)																				
04.02.30 The worker obtains permission to grant 30-day credit accounts to potential customers. (1 task sheet)																				
04.03. Education																				
04.03.01 The worker types educational lists, schedules, letters, and reports. (27 task sheets, detail)																				
04.03.02 The worker processes requests in person or by telephone. (12 task sheets, detail)																				
04.03.03 The worker compiles school records. (10 task sheets, detail)																				
04.03.04 The worker processes applications for new students. (8 task sheets, detail)																				
04.03.05 The worker assists in student registration. (6 task sheets, detail)																				
04.03.06 The worker receives activity funds and fees from students. (6 task sheets, semi-detail)																				
04.03.07 The worker records attendance. (4 task sheets, detail)																				
04.03.08 The worker checks student workers' typewritten work. (1 task sheet, semi-detail)																				
04.03.09 The worker processes applications from special learning disability program schools. (1 task sheet, semi-detail)																				
04.03.10 The worker issues permits to private trade school solicitors. (1 task sheet)																				
04.03.11 The worker processes requests for lecturers. (1 task sheet, semi-detail)																				
04.03.12 The worker processes contracts for scholarship expenses of visiting professors. (1 task sheet, semi-detail)																				
04.04. Securities																				
04.04.01 The worker processes stock certificates. (10 task sheets, detail)																				
04.04.02 The worker prepares stock forms for buying, selling, and transferring stocks. (9 task sheets, detail)																				
04.04.03 The worker verifies stock documents. (9 task sheets, detail)																				
04.04.04 The worker answers questions about securities. (6 task sheets, detail)																				

JOB COMPETENCY

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04.04.05 The worker sends wires to branch stock offices regarding time extensions of payments. (1 task sheet)																				
04.04.06 The worker processes requisitions for savings bonds. (1 task sheet, semi-detail)																				
04.04.07 The worker processes call bonds listed in a national publication. (1 task sheet, semi-detail)																				
04.04.08 The worker issues government bonds. (1 task sheet, semi-detail)																				
04.05. Hotel/Motel																				
04.05.01 The worker arranges check-in of guests. (5 task sheets, semi-detail)																				
04.05.02 The worker records guest charges on room folios. (4 task sheets, semi-detail)																				
04.05.03 The worker processes incoming mail/messages. (4 task sheets, semi-detail)																				
04.05.04 The worker arranges check-out of guests. (3 task sheets, semi-detail)																				
04.05.05 The worker discusses complaints with guests and employees. (2 task sheets, semi-detail)																				
04.05.06 The worker arranges room reservations. (2 task sheets, detail)																				
04.05.07 The worker determines vacancies and percent of occupancy. (2 task sheets, semi-detail)																				
04.05.08 The worker types a function sheet from activities booked. (1 task sheet, semi-detail)																				
04.05.09 The worker updates hotel/motel mail rack. (1 task sheet)																				
04.06. Hospital Services																				
04.06.01 The worker performs procedures for hospital admission from lists of patients, or medical records. (10 task sheets, detail)																				
04.06.02 The worker arranges hospital discharges. (6 task sheets, detail)																				
04.06.03 The worker processes patient funds. (4 task sheets, semi-detail)																				
04.06.04 The worker prepares insurance claims for welfare clients on medicare or medicaid. (2 task sheets, semi-detail)																				
04.06.05 The worker obtains extensions on ID cards. (1 task sheet, semi-detail)																				
04.06.06 The worker prepares birth certificates from delivery room records. (1 task sheet, semi-detail)																				
04.07. Conferences and Meetings																				
04.07.01 The worker arranges conferences and meetings. (11 task sheets, detail)																				
04.07.02 The worker processes registration for conference participants. (2 task sheets, semi-detail)																				

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04.08. Welfare and Aid																				
04.08.01 The worker processes welfare assistance claims. (8 task sheets, detail)																				
04.08.02 The worker processes applications for welfare assistance. (5 task sheets, detail)																				
04.09. Repair Service																				
04.09.01 The worker types service orders and reports. (13 task sheets, detail)																				
04.10. Library																				
04.10.01 The worker processes check out/in of library materials. (3 task sheets, detail)																				
04.10.02 The worker obtains library books from call slips. (2 task sheets, semi-detail)																				
04.10.03 The worker types library index cards. (1 task sheet, semi-detail)																				
04.10.04 The worker assists library users in obtaining materials/books. (1 task sheet, detail)																				
04.10.05 The worker types letters requesting inter-library loans. (1 task sheet, semi-detail)																				
04.11. Miscellaneous Services																				
04.11.01 The worker records items such as traffic tickets, activity reports, and press clippings. (10 task sheets, detail)																				
04.11.02 The worker answers miscellaneous over-the-counter or telephone requests. (8 task sheets, detail)																				
04.11.03 The worker processes ticket sales. (2 task sheets, semi-detail)																				
04.11.04 The worker prepares revised city telephone directory. (1 task sheet, semi-detail)																				
05. ORAL COMMUNICATION																				
05.00.01 The worker processes incoming telephone calls. (160 task sheets, semi-detail)																				
05.00.02 The worker answers incoming telephone calls. (117 task sheets, detail)																				
05.00.03 The worker performs the duties of a receptionist. (50 task sheets, detail)																				
05.00.04 The worker operates a switchboard. (42 task sheets, detail)																				
05.00.05 The worker arranges schedules and patients' appointments. (18 task sheets, detail)																				
05.00.06 The worker answers telephone inquiries. (16 task sheets, detail)																				

JOB COMPETENCY

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05.00.07 The worker places local and long distance telephone calls. (14 task sheets, detail)																				
05.00.08 The worker answers questions regarding patient billing. (3 task sheets, detail)																				
05.00.09 The worker operates a paging system. (2 task sheets, semi-detail)																				
05.00.10 The worker requests repairs or maintenance of guest's room. (1 task sheet, semi-detail)																				
05.00.11 The worker arranges schedules for conference room. (1 task sheet)																				
05.00.12 The worker arranges doctor/patient conferences. (1 task sheet, semi-detail)																				
06. ELECTRONIC DATA PROCESSING																				
06.01. Keypunching, Verifying																				
06.01.01 The worker punches cards from source documents such as invoices, orders, time cards, and instructions. (96 task sheets, detail)																				
06.01.02 The worker operates a verifier. (40 task sheets, detail)																				
06.01.03 The worker operates a keytape machine punching magnetic tape. (8 task sheets)																				
06.01.04 The worker punches corrections in cards. (7 task sheets)																				
06.01.05 The worker operates optical scanner for payroll printout. (2 task sheets)																				
06.01.06 The worker performs quality control checks on the optical-font printing adding machine operator's tape production. (2 task sheets)																				
06.01.07 The worker punches cards coded for school withdrawal. (1 task sheet)																				
06.02. Related Electronic Data Processing																				
06.02.01 The worker checks source documents such as orders, invoices, punched cards, and printouts with computer printouts/listings. (42 task sheets, semi-detail)																				
06.02.02 The worker performs electronic data processing tasks from such items as computer printouts, files, accounting forms, manuals, maps, and instructions. (22 task sheets, detail)																				
06.02.03 The worker codes payment cards, checks, and deposit/withdrawal slips for keypunching. (4 task sheets, semi-detail)																				
06.02.04 The worker maintains control of input/output work flow between corporate trust department and data processing department. (2 task sheets, semi-detail)																				
06.[illegible] The worker corrects computer rejected debits/credits. (2 task sheets, semi-detail)																				

JOB COMPETENCY

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06.02.06 The worker prepares batches of checks for data processing. (1 task sheet, semi-detail)																				
06.02.07 The worker types cash letters for checks drawn on bank but cashed elsewhere. (1 task sheet, semi-detail)																				
06.03. Computer Operation																				
06.03.01 The worker operates reproducer from punched cards, printed lists, and summary cards. (35 task sheets, semi-detail)																				
06.03.02 The worker operates (decollates, bursts, binds) computer output. (6 task sheets, semi-detail)																				
06.03.03 The worker places magnetic tapes on a computer tape drive. (4 task sheets, semi-detail)																				
06.03.04 The worker prepares weekly payroll from payroll tapes. (4 task sheets, semi-detail)																				
06.03.05 The worker verifies manually prepared totals with computer detailed totals. (4 task sheets)																				
06.03.06 The worker operates electronic computer and peripheral equipment. (3 task sheets, semi-detail)																				
06.03.07 The worker sorts batches of checks. (2 task sheets, semi-detail)																				
06.03.08 The worker prepares punched cards for computer run. (2 task sheets)																				
06.03.09 The worker determines computer malfunction by running diagnostics. (2 task sheets)																				
06.03.10 The worker determines accuracy of data speed machine sending installation. (1 task sheet)																				
06.04. Coding																				
06.04.01 The worker codes forms such as purchase orders, invoices, and applications for keypunching. (45 task sheets, semi-detail)																				
06.05. Sorting, Interpreting, Collating, Reproducing, and Tabulating																				
06.05.01 The worker operates unit record equipment such as the sorter, reproducer, collator, and interpreter. (22 task sheets, semi-detail)																				
06.05.02 The worker codes forms such as account statements, production figures, inventory listings, punched cards, wired or unwired boards for keypunching. (5 task sheets)																				
06.05.03 The worker operates optical scanning equipment to convert printed data to punched data. (4 task sheets)																				
06.05.04 The worker adjusts errors on computer input tape. (1 task sheet)																				
06.06. Computer Programming																				
06.06.01 The worker writes computer programs. (18 task sheets, detail)																				

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06.06.02	The worker checks computer programs. (4 task sheets, semi-detail)																				
06.06.03	The worker writes computer program in final form. (3 task sheets, semi-detail)																				
06.06.04	The worker adjusts present computer programs. (1 task sheet, semi-detail)																				
06.06.05	The worker punches prescribed program changes for new computer. (1 task sheet, semi-detail)																				
06.06.06	The worker arranges a time schedule for a new computer program. (1 task sheet, semi-detail)																				
	07. PERSONNEL																				
07.00.01	The worker processes employment applications. (68 task sheets, detail)																				
07.00.02	The worker updates personnel files from changes received. (34 task sheets, detail)																				
07.00.03	The worker arranges orientation of new employees. (37 task sheets, detail)																				
07.00.04	The worker administers employment tests to applicants. (36 task sheets, semi-detail)																				
07.00.05	The worker types personnel reports from such documents as personnel lists, appointment cards, and rough drafts. (35 task sheets, detail)																				
07.00.06	The worker types personnel letters, forms, and cards from documents such as rough draft letters, employment forms, and claim forms. (25 task sheets, detail)																				
07.00.07	The worker compiles payroll information from absentee reports, union cards, and requests for leave. (23 task sheets, detail)																				
07.00.08	The worker compiles new employee personnel data from employment forms, questionnaire work sheets, and applications. (21 task sheets, detail)																				
07.00.09	The worker arranges travel. (18 task sheets, detail)																				
07.00.10	The worker processes travel vouchers. (10 task sheets, detail)																				
07.00.11	The worker arranges transportation from city car pool. (2 task sheets, semi-detail)																				
07.00.12	The worker processes merit award papers and pins. (2 task sheets)																				
07.00.13	The worker assists in labor grievances. (2 task sheets)																				
07.00.14	The worker issues working papers to students. (2 task sheets)																				
07.00.15	The worker issues parking permits. (1 task sheet)																				
07.00.16	The worker issues employee pass cards. (1 task sheet)																				
07.00.17	The worker issues student work permits. (1 task sheet)																				
07.00.18	The worker issues social security cards. (1 task sheet)																				
07.00.19	The worker administers driver tests. (1 task sheet)																				

JOB COMPETENCY

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07.00.20 The worker arranges annual awards meetings. (1 task sheet)																			
07.00.21 The worker issues entertainment tickets. (1 task sheet)																			
07.00.22 The worker discusses labor contract provisions. (1 task sheet)																			
07.00.23 The worker assists in union/management meetings. (1 task sheet)																			
07.00.24 The worker administers highway safety program for salesmen. (1 task sheet)																			
07.00.25 The worker requests student nurses' health examination appointments. (1 task sheet, semi-detail)																			
07.00.26 The worker updates personnel forms. (1 task sheet, semi-detail)																			
07.00.27 The worker administers an orientation program for new hospital employees. (1 task sheet, semi-detail)																			
08. SALES																			
08.00.01 The worker processes sales documents such as charge slips, purchase orders, warrants. (30 task sheets, detail)																			
08.00.02 The worker processes requests by telephone and over the counter. (25 task sheets, detail)																			
08.00.03 The worker types correspondence from dictation, incoming mail, and other source documents. (24 task sheets, detail)																			
08.00.04 The worker types sales items from rough drafts, proposals, lists, and other source documents. (19 task sheets, detail)																			
08.00.05 The worker types orders, memos, and invoices. (16 task sheets, semi-detail)																			
08.00.06 The worker arranges layouts for classified ads. (14 task sheets, semi-detail)																			
08.00.07 The worker answers customer complaints. (13 task sheets, detail)																			
08.00.08 The worker processes classified ads and ad complaints. (12 task sheets, detail)																			
08.00.09 The worker processes customer orders. (10 task sheets, detail)																			
08.00.10 The worker records orders, printouts, and changes. (9 task sheets, semi-detail)																			
08.00.11 The worker updates manuals, catalogs, price lists, and customer accounts. (9 task sheets, semi-detail)																			
08.00.12 The worker composes memos, responses, and TV commercials. (8 task sheets, semi-detail)																			
08.00.13 The worker prepares price quotations for customers and salesmen. (8 task sheets, detail)																			
08.00.14 The worker requests new or extended advertising orders. (7 task sheets, semi-detail)																			

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

		Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
08.00.15	The worker arranges schedules for TV/radio commercials. (3 task sheets, semi-detail)																				
08.00.16	The worker mails product information and advertising materials to customers, prospective customers. (4 task sheets, semi-detail)																				
08.00.17	The worker processes supply requisitions for company salesmen. (2 task sheets, detail)																				
08.00.18	The worker prepares new customer plates on graphotype machine. (1 task sheet, semi-detail)																				
08.00.19	The worker records machine moves from installation transmittals. (1 task sheet)																				
08.00.20	The worker checks unfilled and back orders. (1 task sheet)																				
08.00.21	The worker completes forms for installation of business equipment delivered. (1 task sheet)																				
08.00.22	The worker arranges travel for employees' speaking engagements. (1 task sheet)																				
08.00.23	The worker operates microfilmer on all detail tickets, charge slips, and returned merchandise. (1 task sheet)																				
08.00.24	The worker files advertisements from clipping agency. (1 task sheet)																				
08.00.25	The worker prepares dummy for new books to be published. (1 task sheet, semi-detail)																				
08.00.26	The worker assists committees in public relations activities. (1 task sheet, semi-detail)																				
08.00.27	The worker processes lay-away tickets and merchandise. (1 task sheet)																				
08.00.28	The worker calls businesses for report of company's goods sold or monies collected. (1 task sheet)																				
08.00.29	The worker arranges for a commercial photographer to take pictures of equipment manufactured. (1 task sheet)																				
08.00.30	The worker arranges sample display for salesmen or customers. (1 task sheet)																				
08.00.31	The worker informs customer or insurance coverage. (1 task sheet)																				
08.00.32	The worker arranges sales plan for department store yearly sales. (1 task sheet)																				
	09. INVENTORY, SHIPPING, RECEIVING																				
09.01.	Inventory																				
09.01.01	The worker processes orders from inventory. (24 task sheets, detail)																				
09.01.02	The worker updates inventory records from office supply inventory documents. (24 task sheets, detail)																				

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

		Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing
09.01.03	The worker records finished-goods inventory from production and shipping data. (8 task sheets, semi-detail)																			
09.01.04	The worker completes physical inventory. (6 task sheets, semi-detail)																			
09.01.05	The worker maintains inventory records on stock sent to production. (4 task sheets)																			
09.01.06	The worker compiles revised inventory descriptions periodically. (1 task sheet)																			
09.01.07	The worker proofreads semi-automated stock reports for keypunching. (1 task sheet)																			
09.01.08	The worker transfers stock from warehouse supplies to substore. (1 task sheet)																			
09.01.09	The worker prepares inventory report for salesmen. (1 task sheet)																			
09.02.	**Shipping**																			
09.02.01	The worker types shipping manifest/bills of lading, and waybills. (9 task sheets)																			
09.02.02	The worker arranges delivery routes. (7 task sheets, detail)																			
09.03.03	The worker processes shipping and billing forms on completed jobs. (6 task sheets, detail)																			
09.03.04	The worker verifies contents of outbound shipments. (6 task sheets, detail)																			
09.03.05	The worker checks undelivered shipments. (5 task sheets, detail)																			
09.03.06	The worker sends letter/teletype to customer regarding merchandise shipment. (3 task sheets)																			
09.03.07	The worker distributes shipment listings. (3 task sheets)																			
09.02.08	The worker records shipments. (3 task sheets)																			
09.02.09	The worker completes shipping reports. (1 task sheet)																			
09.03.	**Receiving**																			
09.03.01	The worker records inbound shipments. (9 task sheets, detail)																			
09.03.02	The worker arranges expediting of inbound shipments. (4 task sheets, semi-detail)																			
09.03.03	The worker issues a claim or an adjustment against the carrier/supplier for damaged/short/overshipments. (3 task sheets)																			
09.03.04	The worker processes damage claims. (2 task sheets)																			
09.03.05	The worker processes freight bills for payment. (1 task sheet)																			
09.03.06	The worker arranges return of leased machinery. (1 task sheet)																			
09.03.07	The library worker determines disposition of incoming books. (1 task sheet, semi-detail)																			

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

	Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
10. PURCHASING																				
10.00.01 The worker maintains supplies and stock inventory. (94 task sheets, detail)																				
10.00.02 The worker types purchasing documents. (30 task sheets, detail)																				
10.00.03 The worker arranges expediting of purchase shipments. (5 task sheets, semi-detail)																				
10.00.04 The worker administers purchase and sale of stamps for hospital and patients. (1 task sheet)																				
11. PRODUCTION																				
11.00.01 The worker processes schedules and adjustment of scheduled production orders. (23 task sheets, detail)																				
11.00.02 The worker types production reports. (16 task sheets, detail)																				
11.00.03 The worker discusses production problems with potential customers. (1 task sheet, semi-detail)																				
12. MISCELLANEOUS																				
12.00.01 The worker completes minor repairs and maintenance of duplicating machines. (6 task sheets)																				
12.00.02 The worker operates collator. (4 task sheets)																				
12.00.03 The worker completes binding and padding of printed forms. (3 task sheets)																				
12.00.04 The worker arranges for supply and movement of equipment requested. (3 task sheets)																				
12.00.05 The worker performs time and motion studies. (3 task sheets)																				
12.00.06 The worker arranges graphic display of test results. (3 task sheets)																				
12.00.07 The worker completes tests and reports of company products. (3 task sheets)																				
12.00.08 The worker arranges reception room and coffee serving for employees and guests. (3 task sheets)																				
12.00.09 The worker delivers vouchers or other special documents. (2 task sheets)																				
12.00.10 The worker processes delinquent auto loan collections. (2 task sheets)																				
12.00.11 The worker prepares drawings of buildings or rocket engines. (2 task sheets)																				
12.00.12 The worker determines process for new product. (1 task sheet)																				
12.00.13 The worker discusses handling of franchise contracts. (1 task sheet)																				
12.00.14 The worker packages financial records for permanent storage. (1 task sheet)																				

JOB COMPETENCY

Please check (✓) the competency that is appropriate for each business subject.

		Communication	Data Entry (HS)	Data Processing	Dynamics (HS)	Economics	Law	Machines	Machine Transcription (CC/TI)	Management (Principles)	Mathematics	Office Occupations (HS)	Office Procedures (CC/TI)	Personal Development (CC/TI)	Record Keeping	Records Management (Filing)	Shorthand	Simulated Office	Typewriting	Word Processing	Introduction to Business
12.00.15	The worker calls doctors, hospitals, police, fire department, and insurance carrier in emergencies. -(1 task sheet)																				
12.00.16	The worker operates lost and found department. (1 task sheet)																				
12.00.17	The worker prepares bill of materials from blueprints. (1 task sheet)																				
12.00.18	The worker arranges format of computer output sheets. (1 task sheet)																				
12.00.19	The worker assists technicians such as electricians, plumbers, and painters. (1 task sheet)																				
12.00.20	The worker operates a tag machine for pricing merchandise. (1 task sheet)																				
12.00.21	The worker operates gift wrapping service for customers. (1 task sheet)																				
12.00.22	The worker checks phonograph records. (1 task sheet)																				
12.00.23	The worker codes meter readings for utility billings. (1 task sheet)																				
12.00.24	The worker assists in wind tunnel tests. (1 task sheet)																				
12.00.25	The worker processes labels by dating, sorting, and filing. (1 task sheet)																				

APPENDIX C-2

Task Survey Results by Job

SPECIFIC COMPETENCIES REQUIRED

FOR EACH JOB

CATEGORY: CLERK

D.O.T. Code: 219.488-010
Job Title: Accounting Clerk

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01
01.01.02
01.01.03
01.01.04
01.01.05
01.01.06
01.01.07
01.01.08
01.01.09
01.01.10
01.01.11

01.02. Accounts Payable

01.02.01
01.02.02
01.02.03

01.03. Payroll

01.03.01
01.03.02
01.03.03
01.03.04
01.03.05
01.03.06
01.03.07
01.03.08
01.03.09
01.03.10
01.03.11
01.03.12
01.03.13

01.04. Computing and Checking

01.04.01
01.04.02
01.04.03
01.04.04
01.04.06
01.04.07
01.04.08
01.04.09
01.04.10
01.04.11
01.04.12

01.05. Receipts

01.05.01
01.05.02
01.05.03
01.05.04
01.05.05
01.05.06
01.05.07
01.05.08

01.06. Financial Entries

01.06.01
01.06.02
01.06.03
01.06.04
01.06.05
01.06.06
01.06.07

01.07. Cost Accounting

01.07.01
01.07.02
01.07.03
01.07.04
01.07.05
01.07.06
01.07.07

01.08. Credit

01.08.01
01.08.02
01.08.03
01.08.04
01.08.05
01.08.06
01.08.07
01.08.08
01.08.09
01.08.10
01.08.11

01.09. Disbursements

01.09.01
01.09.02
01.09.03

02. INTERNAL SERVICES

02.01. Mailing

02.01.03
02.01.09

02.03. Non-Computational Recording

02.03.01
02.03.02

04.02. Financial

04.02.01	04.02.19
04.02.02	04.02.20
04.02.03	04.02.21
04.02.04	04.02.23
04.02.05	04.02.24
04.02.06	04.02.25
04.02.12	04.02.26
04.02.13	04.02.27
04.02.14	04.02.28
04.02.15	04.02.29
04.02.16	04.02.30
04.02.17	

04.03. Education

04.03.06

04.04. Securities

04.04.01	04.04.05
04.04.02	04.04.06
04.04.03	04.04.07
04.04.04	04.04.08

04.05. Hotel/Motel

04.05.02
04.05.07

04.06. Hospital Services

04.06.03
04.06.04
04.06.06

04.11. Miscellaneous Services

04.11.03

05. ORAL COMMUNICATION

05.00.08

06. ELECTRONIC DATA PROCESSING

06.02. Related Electronic Data Processing

06.02.04
06.02.05
06.02.06

06.03. Computer Operation

06.03.04
06.03.05
06.03.06

06.05. Sorting, Interpreting, Collating Reproducing and Tabulating

06.05.02
06.05.04

07. PERSONNEL

07.00.07
07.00.10

08. SALES

08.00.01	08.00.11
08.00.02	08.00.17
08.00.10	08.00.28

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.01	09.01.04
09.01.02	09.01.05
09.01.03	09.01.06

10. PURCHASING

10.00.01
10.00.03

12. MISCELLANEOUS

12.00.02	12.00.14
12.00.07	12.00.15
12.00.08	12.00.17
12.00.10	

D.O.T. Code: 237.368-014
Job Title: Appointment Clerk

03. TYPING COMMUNICATION

03.00.15

04. CLIENT RELATED SERVICES

04.07. Conferences & Meetings

04.07.01

04.11. Miscellaneous Services

04.11.02

05. ORAL COMMUNICATION

05.00.01 05.00.06
05.00.02 05.00.07
05.00.04 05.00.09
05.00.05 05.00.12

08. SALES

08.00.15

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 219.388-026
Job Title: Billing Clerk II

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01 01.01.08
01.01.02 01.01.10
01.01.03 01.01.11
01.01.05

01.02. Accounts Payable

01.02.01
01.02.03

01.04. Computing and Checking

01.04.05

01.05. Receipts

01.05.04

01.08. Credit

01.08.02 01.08.08
01.08.04 01.08.10
01.08.05 01.08.11
01.08.07

01.09. Disbursements

01.09.01
01.09.03

05. ORAL COMMUNICATION

05.00.08

07. PERSONNEL

07.00.05

08. SALES

08.00.20

09. INVENTORY, SHIPPING, RECEIVING

09.02. Shipping

09.02.03

09.03. Receiving

09.03.05

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 204.288-010
Job Title: Correspondence Clerk

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.04
01.01.11

01.08. Credit

01.08.04
01.08.06
01.08.07
01.08.11

02. INTERNAL SERVICES

02.01. Mailing

02.01.01
02.01.02
02.01.03
02.01.04
02.01.05
02.01.06
02.01.07
02.01.09
02.01.10
02.01.11
02.01.12
02.01.13
02.01.14
02.01.15
02.01.16
02.01.17
02.01.18
02.01.19

02.02. Filing

02.02.01
02.02.02
02.02.03
02.02.04
02.02.05

02.03. Non-Computational Recording

02.03.04

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01
03.00.02
03.00.03
03.00.04
03.00.05
03.00.11
03.00.12
03.00.14
03.00.15

04. CLIENT RELATED SERVICES

04.02. Financial

04.02.17
04.02.20

04.03. Education

04.03.02

04.05. Hotel/Motel

04.05.09

06. ELECTRONIC DATA PROCESSING

06.04. Coding

06.04.01

08. SALES

08.00.03
08.00.06
08.00.16

09. INVENTORY, SHIPPING, RECEIVING

09.02. Shipping

09.02.06

12. MISCELLANEOUS

12.00.02
12.00.03
12.00.04
12.00.07
12.00.08
12.00.15

D.O.T. Code: 206.388-018
Job Title: File Clerk I

01. NUMERICAL CLERICAL RECORDS

01.03. Payroll

01.03.11

02. INTERNAL SERVICES

02.01. Mailing

02.01.18

02.02. Filing

02.02.01
02.02.02
02.02.03
02.02.04
02.02.05
02.02.06

02.04. Duplicating

02.04.02

08. SALES

08.00.24

12. MISCELLANEOUS

12.00.15
12.00.25

D.O.T. Code: 206.388-022
Job Title: File Clerk II

02. INTERNAL SERVICES

02.01. Mailing

02.01.18

02.02. Filing

02.02.01
02.02.02
02.02.03
02.02.04
02.02.05
02.02.06

02.04. Duplicating

02.04.02

08. SALES

08.00.24

12. MISCELLANEOUS

12.00.15
12.00.25

D.O.T. Code: 209.588-018
Job Title: General Clerk

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01
01.01.02
01.01.03
01.01.04
01.01.05
01.01.06
01.01.07
01.01.08
01.01.09
01.01.10
01.01.11
01.01.12

01.02. Accounts Payable

01.02.01
01.02.03

01.03. Payroll

01.03.06
01.03.07
01.03.08
01.03.09
01.03.10
01.03.11
01.03.13

01.04. Computing and Checking

01.04.01	01.04.07
01.04.02	01.04.08
01.04.03	01.04.09
01.04.04	01.04.10
01.04.06	01.04.12

01.05. Receipts

01.05.01	01.05.05
01.05.02	01.05.06
01.05.03	01.05.07
01.05.04	01.05.08

01.06. Financial Entries

01.06.01	
01.06.03	
01.06.04	
01.06.06	

01.08. Credit

01.08.01	01.08.06
01.08.02	01.08.07
01.08.03	01.08.08
01.08.04	01.08.10
01.08.05	01.08.11

01.09. Disbursements

01.09.03	

02. INTERNAL SERVICES

02.01. Mailing

02.01.01	02.01.11
02.01.02	02.01.12
02.01.03	02.01.13
02.01.04	02.01.14
02.01.05	02.01.15
02.01.06	02.01.16
02.01.07	02.01.17
02.01.08	02.01.18
02.01.09	02.01.19
02.01.10	02.01.20

02.02. Filing

02.02.01	02.02.04
02.02.02	02.02.05
02.02.03	02.02.06

02.03. Non-Computational Recording

02.03.01	02.03.04
02.03.02	02.03.05
02.03.03	

02.04. Duplicating

02.04.01	
02.04.02	
02.04.03	

03. TYPING COMMUNICATION

03.00.01	03.00.09
03.00.04	03.00.10
03.00.06	03.00.11
03.00.07	03.00.15
03.00.08	

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01	04.01.04
04.01.02	04.01.05
04.01.03	04.01.06

04.02. Financial

04.02.01	04.02.15
04.02.05	04.02.21
04.02.07	04.02.22
04.02.08	04.02.23
04.02.09	04.02.26
04.02.10	04.02.27
04.02.11	04.02.28
04.02.12	04.02.29
04.02.13	04.02.30
04.02.14	

04.03. Education

04.03.01	04.03.07
04.03.02	04.03.08
04.03.03	04.03.09
04.03.04	04.03.10
04.03.05	04.03.11
04.03.06	04.03.12

04.04. Securities

04.04.01	04.04.04
04.04.02	04.04.06
04.04.03	04.04.07

04.05. Hotel/Motel

04.05.01	04.05.06
04.05.02	04.05.07
04.05.03	04.05.08
04.05.04	04.05.09
04.05.05	

04.06. Hospital Services

04.06.01	04.06.04
04.06.02	04.06.05
04.06.03	04.06.06

04.07. Conferences and Meetings

04.07.01	
04.07.02	

04.08. Welfare and Aid

04.08.01	
04.08.02	

04.09. Repair Service

04.09.01	

04.10. Library

04.10.01	04.10.04
04.10.02	04.10.05
04.10.03	

04.11. Miscellaneous Services

04.11.01	
04.11.02	
04.11.03	
04.11.04	

05. ORAL COMMUNICATION

05.00.01	05.00.07
05.00.02	05.00.08
05.00.03	05.00.09
05.00.04	05.00.10
05.00.05	05.00.11
05.00.06	05.00.12

06. ELECTRONIC DATA PROCESSING

06.03. Computer Operation

06.03.07	

07. PERSONNEL

07.00.11	07.00.17
07.00.15	07.00.18
07.00.16	07.00.26

08. SALES

08.00.01	08.00.17
08.00.02	08.00.19
08.00.04	08.00.20
08.00.05	08.00.21
08.00.09	08.00.23
08.00.10	08.00.24
08.00.11	08.00.27
08.00.13	08.00.28
08.00.14	08.00.30
08.00.16	08.00.31

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.01	09.01.06
09.01.02	09.01.07
09.01.03	09.01.08
09.01.04	09.01.09
09.01.05	

09.02. Shipping

09.02.01	09.02.06
09.02.02	09.02.07
09.02.03	09.02.08
09.02.04	09.02.09
09.02.05	

09.03. Receiving

09.03.01	09.03.05
09.03.02	09.03.06
09.03.03	09.03.07
09.03.04	

10. PURCHASING

10.00.01	
10.00.02	
10.00.03	
10.00.04	

11. PRODUCTION

11.00.01
11.00.02

12. MISCELLANEOUS

12.00.09	12.00.20
12.00.10	12.00.21
12.00.14	12.00.22
12.00.15	12.00.23
12.00.16	12.00.24
12.00.19	12.00.25

D.O.T. Code: 219.388-066
Job Title: General Office Clerk

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01	01.01.07
01.01.02	01.01.08
01.01.03	01.01.09
01.01.04	01.01.10
01.01.05	01.01.11
01.01.06	01.01.12

01.02. Accounts Payable

01.02.01
01.02.03

01.03. Payroll

01.03.02	01.03.09
01.03.04	01.03.10
01.03.06	01.03.11
01.03.07	01.03.12
01.03.08	01.03.13

01.04. Computing and Checking

01.04.01	01.04.07
01.04.02	01.04.08
01.04.03	01.04.09
01.04.04	01.04.10
01.04.05	01.04.12
01.04.06	

01.05. Receipts

01.05.01	01.05.05
01.05.02	01.05.06
01.05.03	01.05.07
01.05.04	01.05.08

01.06. Financial Entries

01.06.01	01.06.05
01.06.02	01.06.06
01.06.03	01.06.07
01.06.04	

01.07. Cost Accounting

01.07.01

01.08. Credit

01.08.01	0 .08.07
01.08.02	01.08.08
01.08.03	01.08.09
01.08.04	01.08.10
01.08.05	01.08.11
01.08.06	

01.09. Disbursements

01.09.01
01.09.03

02. INTERNAL SERVICES

02.01. Mailing

02.01.01	02.01.11
02.01.02	02.01.12
02.01.03	02.01.13
02.01.04	02.01.14
02.01.05	02.01.15
02.01.06	02.01.16
02.01.07	02.01.17
02.01.08	02.01.18
02.01.09	02.01.19
02.01.10	02.01.20

02.02. Filing

02.02.01	02.02.04
02.02.02	02.02.05
02.02.03	02.02.06

02.03. Non-Computational Recording

02.03.01	02.03.04
02.03.02	02.03.05
02.03.03	

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01	03.00.09
03.00.03	03.00.10
03.00.04	03.00.11
03.00.06	03.00.12
03.00.07	03.00.15
03.00.08	

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01	04.01.04
04.01.02	04.01.05
04.01.03	04.01.06

04.02. Financial

04.02.01	04.02.15
04.02.02	04.02.18
04.02.03	04.02.20
04.02.04	04.02.21
04.02.05	04.02.22
04.02.07	04.02.24
04.02.08	04.02.25
04.02.09	04.02.26
04.02.10	04.02.27
04.02.11	04.02.28
04.02.12	04.02.29
04.02.13	04.02.30
04.02.14	

04.03. Education

04.03.01	04.03.07
04.03.02	04.03.08
04.03.03	04.03.09
04.03.04	04.03.10
04.03.05	04.03.11
04.03.06	04.03.12

04.04. Securities

04.04.01	04.04.05
04.04.02	04.04.06
04.04.03	04.04.07
04.04.04	

04.05. Hotel/Motel

04.05.01	04.05.06
04.05.02	04.05.07
04.05.03	04.05.08
04.05.04	04.05.09
04.05.05	

04.06. Hospital Services

04.06.01	04.06.04
04.06.02	04.06.05
04.06.03	04.06.06

04.07. Conferences and Meetings

04.07.01
04.07.02

04.08. Welfare and Aid

04.08.01
04.08.02

04.09. Repair Service

04.09.01

04.10. Library

04.10.01 04.10.04
04.10.02 04.10.05
04.10.03

04.11. Miscellaneous

04.11.01
04.11.02
04.11.03
04.11.04

05. ORAL COMMUNICATION

05.00.01 05.00.07
05.00.02 05.00.08
05.00.03 05.00.09
05.00.04 05.00.10
05.00.05 05.00.11
05.00.06 05.00.12

06. ELECTRONIC DATA PROCESSING

06.02. Related Electronic Data Processing

06.02.01

06.03. Computer Operation

06.03.06
06.03.07

06.05. Sorting, Interpreting, Collating, Reproducing and Tabulating

06.05.01
06.05.02

07. PERSONNEL

07.00.01 07.00.15
07.00.02 07.00.16
07.00.07 07.00.17
07.00.09 07.00.18
07.00.10 07.00.21
07.00.11 07.00.26
07.00.14

08. SALES

08.00.01 08.00.18
08.00.02 08.00.19
08.00.03 08.00.20
08.00.04 08.00.21
08.00.05 08.00.22
08.00.07 08.00.23
08.00.08 08.00.24
08.00.09 08.00.26
08.00.10 08.00.27
08.00.11 08.00.28
08.00.13 08.00.29
08.00.14 08.00.30
08.00.16 08.00.31
08.00.17

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.01 09.01.06
09.01.02 09.01.07
09.01.03 09.01.08
09.01.04 09.01.09
09.01.05

09.02. Shipping

09.02.01 09.02.06
09.02.02 09.02.07
09.02.03 09.02.08
09.02.04 09.02.09
09.02.05

09.03. Receiving

09.03.01 09.03.05
09.03.02 09.03.06
09.03.03 09.03.07
09.04.04

10. PURCHASING

10.00.01
10.00.02
10.00.03
10.00.04

11. PRODUCTION

11.00.01
11.00.02

12. MISCELLANEOUS

12.00.03 12.00.19
12.00.05 12.00.20
12.00.06 12.00.21
12.00.09 12.00.22
12.00.10 12.00.23
12.00.14 12.00.24
12.00.15 12.00.25
12.00.16

D.O.T. Code: 215.488-010
Job Title: Payroll Clerk

01. NUMERICAL CLERICAL RECORDS

01.03. Payroll

01.03.01 01.03.08
01.03.02 01.03.09
01.03.03 01.03.10
01.03.04 01.03.11
01.03.05 01.03.12
01.03.06 01.03.13
01.03.07

04. CLIENT RELATED SERVICES

04.02. Financial

04.02.24

06. ELECTRONIC DATA PROCESSING

06.01. Keypunching, Verifying

06.01.05

06.03. Computer Operation

06.03.04
06.03.07

07. PERSONNEL

07.00.07

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 205.368-026
Job Title: Personnel Clerk

01. NUMERICAL CLERICAL RECORDS

01.03. Payroll

01.03.10
01.03.13

02. INTERNAL SERVICES

02.02. Filing

02.02.03
02.02.04

03. TYPING COMMUNICATION

03.00.03
03.00.04

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01

04.03. Education

04.03.04

04.05. Hotel/Motel

04.05.01
04.05.02

05. ORAL COMMUNICATION

05.00.06

07. PERSONNEL

07.00.01
07.00.02
07.00.03
07.00.04
07.00.05
07.00.06
07.00.07
07.00.08
07.00.09
07.00.10
07.00.11
07.00.12
07.00.13
07.00.14
07.00.15
07.00.16
07.00.17
07.00.18
07.00.20
07.00.21
07.00.22
07.00.23
07.00.24
07.00.25
07.00.26
07.00.27

08. SALES

08.00.26

12. MISCELLANEOUS

12.00.08
12.00.15
12.00.16

D.O.T. Code: 219.588-038
Job Title: Posting Clerk

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.02
01.01.03
01.01.05
01.01.10

01.02. Accounts Payable

01.02.01
01.02.02
01.02.03

01.03. Payroll

01.03.02
01.03.03
01.03.10

01.04. Computing and Checking

01.04.05

01.05. Receipts

01.05.03
01.05.04
01.05.05
01.05.08

01.06. Financial Entries

01.06.01
01.06.03
01.06.04
01.06.05
01.06.06
01.06.07

01.07. Cost Accounting

01.07.01

01.08. Credit

01.08.11

06. ELECTRONIC DATA PROCESSING

06.04. Coding

06.04.01

07. PERSONNEL

07.00.02
07.00.03
07.00.07

08. SALES

08.00.01

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.03

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 237.368-038
Job Title: Receptionist

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.06
01.01.09
01.01.11

02. INTERNAL SERVICES

02.01. Mailing

02.01.01	02.01.11
02.01.02	02.01.14
02.01.03	02.01.15
02.01.04	02.01.16
02.01.05	02.01.17
02.01.07	02.01.18
02.01.10	

02.02. Filing

02.02.01

02.03. Non-Computational Recording

02.03.02

02.04. Duplicating

02.04.01

03. TYPING COMMUNICATION

03.00.01	03.00.10
03.00.08	03.00.11
03.00.09	03.00.15

04. CLIENT RELATED SERVICES

04.03. Education

04.03.02

04.05. Hotel/Motel

04.05.01	04.05.06
04.05.02	04.05.07
04.05.03	04.05.08
04.05.04	04.05.09
04.05.05	

04.06. Hospital Services

04.06.03

04.11. Miscellaneous Services

04.11.02

05. ORAL COMMUNICATION

05.00.01
05.00.02
05.00.03
05.00.04
05.00.05
05.00.06
05.00.07
05.00.08
05.00.09
05.00.10
05.00.11
05.00.12

07. PERSONNEL

07.00.03
07.00.06

08. SALES

08.00.02
08.00.07
08.00.16

12. MISCELLANEOUS

12.00.08
12.00.15
12.00.16

D.O.T. Code: 202.388-014
Job Title: Stenographer

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01

02. INTERNAL SERVICES

02.01. Mailing

02.01.01

02.04. Duplicating

02.04.01

03. TYPING COMMUNICATION

03.00.01
03.00.02
03.00.03
03.00.04
03.00.05
03.00.06
03.00.08
03.00.09
03.00.10
03.00.11
03.00.12
03.00.15

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01

04.02. Financial

04.02.22

04.03. Education

04.03.01

04.09. Repair Service

04.09.01

06. ELECTRONIC DATA PROCESSING

06.02. Related Electronic Data Processing

06.02.07

07. PERSONNEL

07.00.05
07.00.06

08. SALES

08.00.03
08.00.04
08.00.05

12. MISCELLANEOUS

12.00.15

SPECIFIC COMPETENCIES REQUIRED

FOR EACH JOB

CATEGORY: MACHINE OPERATOR

D.O.T. Code: 216.488-010
Job Title: Adding Machine Operator

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.03
01.01.05
01.01.08

01.02. Accounts Payable

01.02.01

01.03. Payroll

01.03.08
01.03.09
01.03.10

01.04 Computing and Checking

01.04.01
01.04.02
01.04.03
01.04.04
01.04.05
01.04.06
01.04.09

01.05. Receipts

01.05.08

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 216.488-018
Job Title: Calculating Machine Operator

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.03
01.01.05
01.01.06
01.01.07
01.01.08

01.02 Accounts Payable

01.02.01
01.02.02

01.03. Payroll

01.03.03
01.03.08
01.03.09
01.03.10
01.03.11

01.04 Computing and Checking

01.04.01
01.04.02
01.04.03
01.04.04
01.04.05
01.04.06
01.04.09
01.04.10

01.05. Receipts

01.05.01
01.05.06
01.05.08

01.07 Cost Accounting

01.07.01
01.07.03

01.08. Credit

01.08.10

06. ELECTRONIC DATA PROCESSING

06.03. Computer Operation

06.03.05

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 213.582-010
Job Title: Key-Punch

01. NUMERICAL CLERICAL RECORDS

01.03. Payroll

01.03.05
01.03.12
01.03.13

06. ELECTRONIC DATA PROCESSING

06.01. Keypunching, Verifying

06.01.01
06.01.02
06.01.03
06.01.04
06.01.05
06.01.07

06.02. Related Electronic Data Processing

06.02.01
06.02.02
06.02.03

06.03. Computer Operation

06.03.08

05.05. Sorting, Interpreting, Collating, Reproducing, and Tabulating

06.05.02
06.05.03

06.06. Computer Programming

06.06.05

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.07

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 208.138-010
Job Title: Transcriber, Head

03. TYPING COMMUNICATION		12. MISCELLANEOUS
03.00.01	03.00.05	12.00.15
03.00.02	03.00.08	
03.00.03	03.00.09	
03.00.04		

D.O.T. Code: 208.588-026
Job Title: Transcribing Machine Operator

03. TYPING COMMUNICATION		12. MISCELLANEOUS
03.00.01	03.00.05	12.00.15
03.00.02	03.00.08	
03.00.03	03.00.09	
03.00.04		

D.O.T. Code: 207.782-014
Job Title: Duplicating Machine Operator II

02. INTERNAL SERVICES		04. CLIENT RELATED SERVICES
02.04. Duplicating		04.01. Insurance
02.04.01		04.01.05
02.04.02		
02.04.03		12. MISCELLANEOUS
03. TYPING COMMUNICATION		12.00.01
		12.00.02
03.00.01		12.00.03
03.00.08		12.00.15
03.00.11		

D.O.T. Code: 207.782-018
Job Title: Duplicating Machine Operator III

02. INTERNAL SERVICES		04. CLIENT RELATED SERVICES
02.04. Duplicating		04.01. Insurance
02.04.01		04.01.05
02.04.02		
02.04.03		12. MISCELLANEOUS
03. TYPING COMMUNICATION		12.00.01
		12.00.02
03.00.01		12.00.03
03.00.11		12.00.15

D.O.T. Code: 207.782-026
Job Title: Offset Duplicating Operator

02. INTERNAL SERVICES

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.11

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.05

12. MISCELLANEOUS

12.00.01
12.00.02
12.00.03
12.00.15

SPECIFIC COMPETENCIES REQUIRED

FOR EACH JOB

CATEGORY: SECRETARY

D.O.T. Code: 169.168-018
Job Title: Administrative Secretary

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01	01.01.07
01.01.02	01.01.08
01.01.03	01.01.09
01.01.04	01.01.10
01.01.05	01.01.11
01.01.06	01.01.12

01.02. Accounts Payable

01.02.01
01.02.03

01.03. Payroll

01.03.01	01.03.08
01.03.02	01.03.09
01.03.03	01.03.10
01.03.04	01.03.11
01.03.06	01.03.12
01.03.07	01.03.13

01.04. Computing and Checking

01.04.01	01.04.07
01.04.02	01.04.08
01.04.03	01.04.09
01.04.04	01.04.10
01.04.05	01.04.11
01.04.06	

01.05. Receipts

01.05.01	01.05.05
01.05.02	01.05.06
01.05.03	01.05.07
01.05.04	01.05.08

01.06. Financial Entries

01.06.01	01.06.05
01.06.02	01.06.06
01.06.03	01.06.07
01.06.04	

01.07. Cost Accounting

01.07.01	01.07.06
01.07.03	01.07.07
01.07.05	

01.08. Credit

01.08.01	01.08.07
01.08.02	01.08.08
01.08.03	01.08.09
01.08.04	01.08.10
01.08.05	01.08.11
01.08.06	

01.09. Disbursements

01.09.01
01.09.02
01.09.03

02. INTERNAL SERVICES

02.01. Mailing

02.01.01	02.01.12
02.01.02	02.01.13
02.01.03	02.01.14
02.01.04	02.01.15
02.01.06	02.01.16
02.01.07	02.01.17
02.01.09	02.01.18
02.01.10	02.01.19
02.01.11	02.01.20

02.02. Filing

02.02.01 02.02.04
02.02.02 02.02.05
02.02.03 02.02.06

02.03. Non-Computational Recording

02.03.01 02.03.04
02.03.02 02.03.05
02.03.03

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01 03.00.08
03.00.02 03.00.09
03.00.03 03.00.10
03.00.04 03.00.11
03.00.05 03.00.12
03.00.06 03.00.14
03.00.07 03.00.15

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01 04.01.04
04.01.02 04.01.05
04.01.03 04.01.06

04.02. Financial

04.02.01 04.02.15
04.02.02 04.02.16
04.02.03 04.02.17
04.02.04 04.02.18
04.02.05 04.02.19
04.02.06 04.02.20
04.02.07 04.02.21
04.02.08 04.02.22
04.02.09 04.02.23
04.02.10 04.02.24
04.02.11 04.02.25
04.02.13 04.02.30

04.03. Education

04.03.01 04.03.08
04.03.02 04.03.09
04.03.03 04.03.10
04.03.04 04.03.11
04.03.05 04.03.12
04.03.07

04.04. Securities

04.04.01 04.04.05
04.04.02 04.04.06
04.04.03 04.04.07
04.04.04 04.04.08

04.05. Hotel/Motel

04.05.05
04.05.07

04.06. Hospital Services

04.06.01

04.07. Conferences and Meetings

04.07.01
04.07.02

04.08. Welfare and Aid

04.08.01
04.08.02

04.09. Repair Service

04.09.01

04.11. Miscellaneous

04.11.01
04.11.02

05. ORAL COMMUNICATION

05.00.01 05.00.09
05.00.02 05.00.10
05.00.03 05.00.11
05.00.06 05.00.12
05.00.07

07. PERSONNEL

07.00.01	07.00.13
07.00.02	07.00.14
07.00.03	07.00.16
07.00.04	07.00.20
07.00.05	07.00.21
07.00.06	07.00.22
07.00.07	07.00.23
07.00.08	07.00.24
07.00.09	07.00.25
07.00.10	07.00.26
07.00.11	07.00.27
07.00.12	

08. SALES

08.00.01	08.00.16
08.00.02	08.00.17
08.00.03	08.00.20
08.00.04	08.00.21
08.00.05	08.00.22
08.00.06	08.00.23
08.00.07	08.00.24
08.00.08	08.00.25
08.00.10	08.00.26
08.00.11	08.00.29
08.00.12	08.00.30
08.00.13	08.00.31
08.00.14	08.00.32
08.00.15	

10. PURCHASING

10.00.01
10.00.04

11. PRODUCTION

11.00.02
11.00.03

12. MISCELLANEOUS

12.00.05	12.00.12
12.00.06	12.00.13
12.00.08	12.00.15
12.00.10	12.00.16

D.O.T. Code: 201.368-010
Job Title: Legal Secretary

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01	01.01.09
01.01.03	01.01.11
01.01.04	

01.04. Computing and Checking

01.04.08

01.05. Receipts

01.05.01
01.05.06

01.06. FINANCIAL ENTRIES

01.06.01
01.06.07

01.08. Credit

01.08.08

01.09. Disbursements

01.09.03

02. INTERNAL SERVICES

02.01. Mailing

02.01.01	02.01.12
02.01.02	02.01.14
02.01.03	02.01.15
02.01.04	02.01.16
02.01.07	02.01.17
02.01.09	02.01.18
02.01.11	

02.02. Filing

02.02.01	02.02.04
02.02.02	02.02.05
02.02.03	02.02.06

02.03. Non-Computational Recording

02.03.01	02.03.04
02.03.02	02.03.05
02.03.03	

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01	03.00.09
03.00.02	03.00.10
03.00.03	03.00.11
03.00.04	03.00.12
03.00.06	03.00.15
03.00.08	

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01	04.01.04
04.01.02	04.01.06
04.01.03	

04.02. Financial

04.02.01
04.02.05
04.02.06

04.07. Conferences and Meetings

04.07.01
04.07.02

04.09. Repair Service

04.09.01

05. ORAL COMMUNICATION

05.00.01	05.00.07
05.00.02	05.00.08
05.00.03	05.00.09
05.00.04	05.00.11
05.00.05	05.00.12
05.00.06	

07. PERSONNEL

07.00.01	07.00.07
07.00.02	07.00.08
07.00.03	07.00.09
07.00.04	07.00.10
07.00.05	07.00.11
07.00.06	07.00.26

08. SALES

08.00.02
08.00.03
08.00.04
08.00.05

12. MISCELLANEOUS

12.00.08
12.00.15

D.O.T. Code: 201.368-014
Job Title: Medical Secretary

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01 01.01.08
01.01.03 01.01.09
01.01.04 01.01.10
01.01.05 01.01.11
01.01.06 01.01.12

01.02. Accounts Payable

01.02.01

01.03. Payroll

01.03.01
01.03.06
01.03.07
01.03.12

01.04. Computing and Checking

01.04.08

01.05. Receipts

01.05.01 01.05.04
01.05.02 01.05.06
01.05.03

01.08. Credit

01.08.08

01.09. Disbursements

01.09.03

02. INTERNAL SERVICES

02.01. Mailing

02.01.01 02.01.12
02.01.02 02.01.14
02.01.03 02.01.15
02.01.04 02.01.16
02.01.07 02.01.17
02.01.09 02.01.18
02.01.10 02.01.20
02.01.11

02.02. Filing

02.02.01 02.02.04
02.02.02 02.02.05
02.02.03 02.02.06

02.03. Non-Computational Recording

02.03.01 02.03.04
02.03.02 02.03.05
02.03.03

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01 03.00.08
03.00.02 03.00.09
03.00.03 03.00.10
03.00.04 03.00.11
03.00.05 03.00.12
03.00.06 03.00.15

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01 04.01.04
04.01.02 04.01.05
04.01.03 04.01.06

04.02. Financial

04.02.01
04.02.03
04.02.05

04.06. Hospital Services

04.06.01 04.06.04
04.06.02 04.06.05
04.06.03 04.06.06

04.07. Conferences and Meetings

04.07.01
04.07.02

04.08. Welfare and Aid

04.08.01

04.09. Repair Service

04.09.01

05. ORAL COMMUNICATION

05.00.01
05.00.02
05.00.03
05.00.04
05.00.05
05.00.06
05.00.07
05.00.08
05.00.09
05.00.11
05.00.12

07. PERSONNEL

07.00.01
07.00.02
07.00.03
07.00.04
07.00.05
07.00.06
07.00.07
07.00.08
07.00.09
07.00.10
07.00.11
07.00.16
07.00.25
07.00.26
07.00.27

08. SALES

08.00.02
08.00.03
08.00.04
08.00.05

10. PURCHASING

10.00.04

12. MISCELLANEOUS

12.00.08
12.00.15

D.O.T. Code: 201.368-018
Job Title: Secretary

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01
01.01.02
01.01.03
01.01.04
01.01.05
01.01.06
01.01.07
01.01.08
01.01.09
01.01.10
01.01.11
01.01.12

01.02. Accounts Payable

01.02.01
01.02.02
01.02.03

01.03. Payroll

01.03.01
01.03.02
01.03.03
01.03.04
01.03.05
01.03.06
01.03.07
01.03.08
01.03.09
01.03.10
01.03.11
01.03.12
01.03.13

01.04. Computing and Checking

01.04.01
01.04.02
01.04.03
01.04.04
01.04.05
01.04.06
01.04.07
01.04.08
01.04.09
01.04.10
01.04.11
01.04.12

01.05. Receipts

01.05.01	01.05.05
01.05.02	01.05.06
01.05.03	01.05.07
01.05.04	01.05.08

01.06. Financial Entries

01.06.01	01.06.05
01.06.02	01.06.06
01.06.03	01.06.07
01.06.04	

01.07. Cost Accounting

01.07.01	
01.07.04	

01.08. Credit

01.08.01	01.08.07
01.08.02	01.08.08
01.08.03	01.08.09
01.08.04	01.08.10
01.08.05	01.08.11
01.08.06	

01.09. Disbursements

01.09.01	
01.09.02	
01.09.03	

02. INTERNAL SERVICES

02.01. Mailing

02.01.01	02.01.11
02.01.02	02.01.12
02.01.03	02.01.13
02.01.04	02.01.14
02.01.05	02.01.15
02.01.06	02.01.16
02.01.07	02.01.17
02.01.08	02.01.18
02.01.09	02.01.19
02.01.10	02.01.20

02.02. Filing

02.02.01	02.02.05
02.02.02	02.02.06
02.02.03	
02.02.04	

02.03. Non-Computational Recording

02.03.01	02.03.04
02.03.02	02.03.05
02.03.03	

02.04. Duplicating

02.04.01	
02.04.02	
02.04.03	

03. TYPING COMMUNICATION

03.00.01	03.00.08
03.00.02	03.00.09
03.00.03	03.00.10
03.00.04	03.00.11
03.00.05	03.00.12
03.00.06	03.00.14
03.00.07	03.00.15

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01	04.01.04
04.01.02	04.01.05
04.01.03	04.01.06

04.02. Financial

04.02.01	04.02.16
04.02.02	04.02.17
04.02.03	04.02.18
04.02.04	04.02.19
04.02.05	04.02.20
04.02.06	04.02.21
04.02.07	04.02.22
04.02.08	04.02.23
04.02.09	04.02.24
04.02.10	04.02.25
04.02.11	04.02.26
04.02.12	04.02.27
04.02.13	04.02.28
04.02.14	04.02.29
04.02.15	04.02.30

04.03. Education

04.03.01 04.03.07
04.03.02 04.03.08
04.03.03 04.03.09
04.03.04 04.03.10
04.03.05 04.03.11
04.03.06 04.03.12

04.04. Securities

04.04.01 04.04.05
04.04.02 04.04.06
04.04.03 04.04.07
04.04.04 04.04.08

04.05. Hotel/Motel

04.05.01 04.05.05
04.05.02 04.05.06
04.05.03 04.05.07
04.05.04 04.05.08

04.06. Hospital Services

04.06.01 04.06.04
04.06.02 04.06.05
04.06.03 04.06.06

04.07. Conferences and Meetings

04.07.01
04.07.02

04.08. Welfare and Aid

04.08.01
04.08.02

04.09. Repair Services

04.09.01

04.10. Library

04.10.01 04.10.04
04.10.02 04.10.05
04.10.03

04.11. Miscellaneous Services

04.11.01
04.11.02
04.11.03
04.11.04

05. ORAL COMMUNICATION

05.00.01 05.00.07
05.00.02 05.00.08
05.00.03 05.00.09
05.00.04 05.00.10
05.00.05 05.00.11
05.00.06 05.00.12

06. ELECTRONIC DATA PROCESSING

06.02. Related Electronic Data Processing

06.02.01 06.02.06
06.02.02 06.02.07
06.02.03

06.03. Computer Operation

06.03.05
06.03.06

06.05. Sorting, Interpreting, Collating, Reproducing, Tabulating

06.05.01
06.05.02

07. PERSONNEL

07.00.01 07.00.13
07.00.02 07.00.14
07.00.03 07.00.15
07.00.04 07.00.16
07.00.05 07.00.17
07.00.06 07.00.18
07.00.07 07.00.20
07.00.08 07.00.21
07.00.09 07.00.23
07.00.10 07.00.25
07.00.11 07.00.26
07.00.12 07.00.27

08. SALES

08.00.01	08.00.17
08.00.02	08.00.18
08.00.03	08.00.19
08.00.04	08.00.20
08.00.05	08.00.21
08.00.06	08.00.22
08.00.07	08.00.23
08.00.08	08.00.24
08.00.09	08.00.25
08.00.10	08.00.26
08.00.11	08.00.27
08.00.12	08.00.28
08.00.13	08.00.29
08.00.14	08.00.30
08.00.15	08.00.31
08.00.16	08.00.32

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.01	09.01.05
09.01.02	09.01.06
09.01.03	09.01.07
09.01.04	09.01.09

09.02. Shipping

09.02.01	09.02.07
09.02.02	09.02.08
09.02.03	09.02.09
09.02.06	

09.03. Receiving

09.03.01	09.03.04
09.03.02	09.03.06
09.03.03	09.03.07

10. PURCHASING

10.00.01
10.00.02
10.00.03
10.00.04

11. PRODUCTION

11.00.01
11.00.02
11.00.03

12. MISCELLANEOUS

12.00.01	12.00.09
12.00.02	12.00.10
12.00.03	12.00.13
12.00.04	12.00.14
12.00.05	12.00.15
12.00.06	12.00.16
12.00.07	12.00.25
12.00.08	

D.O.T. Code: 201.268-010
Job Title: Social Secretary

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01

01.04. Computing and Checking

01.04.08

01.05. Receipts

01.05.06

02. INTERNAL SERVICES

02.01. Mailing

02.01.01
02.01.04

02.02. Filing

02.02.04

02.04. Duplicating

02.04.01

03. TYPING COMMUNICATION

03.00.01	03.00.09
03.00.02	03.00.10
03.00.03	03.00.11
03.00.04	03.00.12
03.00.08	03.00.15

04. CLIENT RELATED SERVICES

04.07. Conferences and Meetings

04.07.01
04.07.02

05. ORAL COMMUNICATION

05.00.01	05.00.06
05.00.02	05.00.07
05.00.03	05.00.11
05.00.04	

07. PERSONNEL

07.00.01	07.00.09
07.00.02	07.00.10
07.00.03	07.00.11
07.00.05	07.00.21
07.00.06	

08. SALES

08.00.22
08.00.26

12. MISCELLANEOUS

12.00.08
12.00.15

SPECIFIC COMPETENCIES REQUIRED

FOR EACH JOB

CATEGORY: TYPISTS

D.O.T. Code: 207.782-030
Job Title: Automatic Typewriter Operator

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01
01.01.03

01.07. Cost Accounting

01.07.04

02. INTERNAL SERVICES

02.03. Non-Computational Recording

02.03.01
02.03.02
02.03.03
02.03.04

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01
03.00.03
03.00.04
03.00.05
03.00.06
03.00.07
03.00.08
03.00.09
03.00.10
03.00.11
03.00.12

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01

04.03. Education

04.03.01

04.09. Repair Service

04.09.01

04.10. Library

04.10.05

06. ELECTRONIC DATA PROCESSING

06.02. Related Electronic Data Processing

06.02.07

07. PERSONNEL

07.00.06

08. SALES

08.00.03
08.00.04
08.00.05

09. INVENTORY, SHIPPING, RECEIVING

09.02. Shipping

09.02.01

11. PRODUCTION

11.00.02

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 209.388-022
Job Title: Clerk-Typist

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01
01.01.03
01.01.08

01.03. Payroll

01.03.09

01.07. Cost Accounting

01.07.04

01.08. Credit

01.08.03 01.08.06
01.08.04 01.08.07
01.08.05

02. INTERNAL SERVICES

02.01. Mailing

02.01.01 02.01.13
02.01.02 02.01.14
02.01.03 02.01.15
02.01.04 02.01.16
02.01.06

02.02. Filing

02.02.01 02.02.04
02.02.02 02.02.05
02.02.03 02.02.06

02.03. Non-Computational Recording

02.03.01 02.03.04
02.03.02 02.03.05
02.03.03

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01 03.00.07
03.00.02 03.00.08
03.00.03 03.00.09
03.00.04 03.00.10
03.00.05 03.00.11
03.00.06 03.00.12

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01

04.02. Financial

04.02.21
04.02.22

04.03. Education

04.03.01
04.03.02
04.03.03

04.05. Hotel/Motel

04.05.01 04.05.04
04.05.02 04.05.08
04.05.03 04.05.09

04.06. Hospital Services

04.06.01
04.06.06

04.08. Welfare & Aid

04.08.02

04.09. Repair Service

04.09.01

04.10. Library

04.10.03
04.10.05

04.11. Miscellaneous Services

04.11.04

05. ORAL COMMUNICATION

05.00.06
05.00.09

06. ELECTRONIC DATA PROCESSING

06.02. Related Electronic Data Processing

06.02.07

07. PERSONNEL

07.00.05
07.00.06

08. SALES

08.00.03
08.00.04
08.00.05
08.00.25

09. INVENTORY, SHIPPING, RECEIVING

09.01. Inventory

09.01.09

09.02. Shipping

09.02.01
09.02.06

10. PURCHASING

10.00.02

11. PRODUCTION

11.00.02

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 213.588-010
Job Title: Data Typist

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01
01.01.03
01.01.07

01.07. Cost Accounting

01.07.04

01.08. Credit

01.08.04

02. INTERNAL SERVICES

02.03 Non-Computational Recording

02.03.01
02.03.02
02.03.03

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01
03.00.03
03.00.04
03.00.05
03.00.06
03.00.09
03.00.10
03.00.11

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01

04.03. Education

04.03.01

06. ELECTRONIC DATA PROCESSING

06.02. Related Electronic Data Processing

06.02.06
06.02.07

11. PRODUCTION

11.00.02

12. MISCELLANEOUS

12.00.15

D.O.T. Code: 203.588-018
Job Title: TYPIST

01. NUMERICAL CLERICAL RECORDS

01.01. Accounts Receivable

01.01.01 01.01.07
01.01.03 01.01.08
01.01.04

01.03. Payroll

01.03.03
01.03.13

01.07. Cost Accounting

01.07.04

01.08. Credit

01.08.04
01.08.05

02. INTERNAL SERVICES

02.01. Mailing

02.01.06
02.01.14
02.01.15
02.01.16

02.02. Filing

02.02.02
02.02.04

02.03. Non-Computational Recording

02.03.01 02.03.04
02.03.02 02.04.05
02.03.03

02.04. Duplicating

02.04.01
02.04.02
02.04.03

03. TYPING COMMUNICATION

03.00.01 03.00.08
03.00.02 03.00.09
03.00.03 03.00.10
03.00.04 03.00.11
03.00.05 03.00.12
03.00.06 03.00.15
03.00.07

04. CLIENT RELATED SERVICES

04.01. Insurance

04.01.01

04.03. Financial

04.02.22

04.03. Education

04.03.01
04.03.02
04.03.05
04.03.08

04.04. Securities

04.04.02

04.05. Hotel/Motel

04.05.08

04.06. Hospital Services

04.06.06

04.09. Repair Service

04.09.01

04.10. Library

04.10.03
04.10.05

04.11. Miscellaneous Services

04.11.04

05. ORAL COMMUNICATION

05.00.06
05.00.09

06. ELECTRONIC DATA PROCESSING

06.01. Keypunching, Verifying

06.01.01

06.02. Related Electronic Data Processing

06.02.07

07. PERSONNEL

07.00.05
07.00.06

08. SALES

08.00.03
08.00.04
08.00.05
08.00.18
08.00.25

09. INVENTORY, SHIPPING, RECEIVING

09.02. Shipping

09.02.01
09.02.06

10. PURCHASING

10.00.02

11. PRODUCTION

11.00.02

12. MISCELLANEOUS

12.00.02
12.00.15

APPENDIX C-3

NOBELS Task Survey - Knowledge, Skill, Attitude

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
	01. NUMERICAL CLERICAL RECORDS			
	01.01. Accounts Receivable			
01.01.01	The worker types invoices from such documents as sales tickets, contracts, and receiving reports. (59 task sheets, detail)	9		21
01.01.02	The worker records accounts receivables from such documents as salesmen's orders, cash receipts, and invoices. (48 task sheets, detail)	16		11
01.01.03	The worker prepares billings of sales. (41 task sheets, detail)	14		12
01.01.04	The worker writes delinquent customer. (27 task sheets, detail)	20	9	12
01.01.05	The worker verifies customer's account receivable. (18 task sheets, detail)	18		9
01.01.06	The worker completes medical charges for insurance reimbursement. (15 task sheets, detail)	17		11
01.01.07	The worker completes sales reports. (12 task sheets, detail)	17		9
01.01.08	The worker prepares statements from patient's accounts and charge slips. (8 task sheets, detail)	17	1	12
01.01.09	The worker calls delinquent customers. (4 task sheets, semi-detail)	17	15	7
01.01.10	The worker processes changes in status of account. (2 task sheets, semi-detail)	17		12
01.01.11	The worker requests payment from delinquent patients. (2 task sheets, semi-detail)	13	12	12
01.01.12	The worker processes follow-up records of patient's visit. (1 task sheet, semi-detail)	15		13
	01.02. Accounts Payable			
01.02.01	The worker computes accounts payables from source documents. (69 task sheets, detail)	17		15
01.02.02	The worker records accounts payables. (47 task sheets, detail)	14		12
01.02.03	The worker prepares payments from documents such as invoices, bills, and vouchers. (33 task sheets, detail)	19		11
	01.03. Payroll			
01.03.01	The worker prepares payroll. (73 task sheets, detail)	19		10
01.03.02	The worker records payroll information. (27 task sheets, detail)	14		15
01.03.03	The worker computes payroll changes. (17 task sheets, detail)	14		13
01.03.04	The worker compiles payroll reports from payroll sheets, time sheets, job cards, and printouts. (15 task sheets, detail)	18		13
01.03.05	The worker punches payroll data. (8 task sheets, semi-detail)	7		21

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
01.03.06	The worker records payroll changes for hospital employees. (2 task sheets, semi-detail)	16		13
01.03.07	The worker prepares a dummy payroll. (1 task sheet, semi-detail)	18		12
01.03.08	The worker computes salesmen's commission. (1 task sheet, semi-detail)	15		14
01.03.09	The worker prepares time cards. (1 task sheet, semi-detail)	17		12
01.03.10	The worker updates weekly payroll time cards. (1 task sheet, semi-detail)	16		13
01.03.11	The worker maintains records of time spent developing new products from weekly activity tickets. (1 task sheet, semi-detail)	15	1	13
01.03.12	The worker processes status time slips. (1 task sheet, semi-detail)	16		12
01.03.13	The worker compiles an employee transfer list from output cards. (1 task sheet, semi-detail)	16	2	14
01.04.	Computing and Checking			
01.04.01	The worker checks the accuracy of source documents such as sales, purchasing, tax reports, and forms. (28 task sheets, detail)	19	1	12
01.04.02	The worker verifies totals of cancelled checks, computer tapes, and tellers' balance sheets. (21 task sheets, detail)	15	1	19
01.04.03	The worker verifies cash receipts for deposit. (18 task sheets, detail)	14	1	17
01.04.04	The worker performs routine check on such items as deposit slips, adding machine tapes, and advices. (15 task sheets, detail)	13		14
01.04.05	The worker corrects checks, savings and withdrawal slips, balance sheets, and other source documents. (12 task sheets, detail)	17		13
01.04.06	The worker checks computations with proofing machine. (8 task sheets, detail)	13	1	19
01.04.07	The worker distributes daily cash to tellers in branch banks. (2 task sheets, semi-detail)	16		12
01.04.08	The worker sorts coins from the federal reserve bank daily. (2 task sheets, semi-detail)	12	1	16
01.04.09	The worker verifies installment loan balances. (1 task sheet, semi-detail)	16		11
01.04.10	The worker prepares night deposits. (1 task sheet, semi-detail)	15		12
01.04.11	The worker performs audit of particular functions in individual departments of the bank. (1 task sheet, semi-detail)	18	2	11
01.04.12	The worker codes transaction tax on tickets. (1 task sheet)	15	1	14

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
01.05. Receipts				
01.05.01	The worker prepares the bank deposit from cash receipts. (27 task sheets, detail)	15		15
01.05.02	The worker receives payments over the counter. (20 task sheets, detail)	15	8	13
01.05.03	The worker records payments received. (17 task sheets, detail)	14		15
01.05.04	The worker records payments for medical services. (16 task sheets, detail)	15		15
01.05.05	The worker records deposits to customer accounts. (12 task sheets, detail)	14		16
01.05.06	The worker prepares reconciliation of bank account. (8 task sheets, detail)	18		13
01.05.07	The worker processes money for library books and films from check-out requests and late and lost book notices. (3 task sheets, semi-detail)	16		13
01.05.08	The worker performs bookkeeping duties of a small bank. (1 task sheet, semi-detail)	19	2	13
01.06. Financial Entries				
01.06.01	The worker records data for financial reports from schedules, license fee forms, and damage claims. (28 task sheets, detail)	16		15
01.06.02	The worker prepares financial reports. (26 task sheets, detail)	19		12
01.06.03	The worker records items such as stocks, bonds, deposit slips, and passbooks. (18 task sheets, detail)	14		15
01.06.04	The worker records receipts and withdrawals in the ledger. (13 task sheets, detail)	14		15
01.06.05	The worker records loan payment reversing entries. (1 task sheet, semi-detail)	16		14
01.06.06	The worker records monies received for or spent from internal accounts. (1 task sheet, semi-detail)	15		15
01.06.07	The worker adjusts property tax records from transfer forms. (1 task sheet, semi-detail)	19	2	13
01.07. Cost Accounting				
01.07.01	The worker compiles unit costs of jobs and sales/production estimates from expense sheets and/or total sales figures. (33 task sheets, detail)	20	1	13

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
01.07.02	The worker prepares bids and cost estimates of products and services. (12 task sheets, semi-detail)	19		10
01.07.03	The worker compiles variance reports from actual and standard cost figures. (7 task sheets, semi-detail)	19		11
01.07.04	The worker types cost analysis reports. (4 task sheets, semi-detail)	8		19
01.07.05	The worker determines cost estimates by observing production and scanning blueprints. (2 task sheets, semi-detail)	19	4	10
01.07.06	The worker compiles relevant statistics and determines improvements in methods by submitting cost analysis of proposed changes. (2 task sheets)	20	3	11
01.07.07	The worker processes new accrual accounts from current cost analyses and additional specifications. (2 task sheets)	19	3	11
01.08.	Credit			
01.08.01	The worker processes credit applications. (17 task sheets, detail)	14	2	15
01.08.02	The worker verifies customer credit. (8 task sheets, detail)	14	2	13
01.08.03	The worker processes credit information. (8 task sheets, semi-detail)	13	2	12
01.08.04	The worker informs applicant and company department of approved/rejected credit applications. (7 task sheets, detail)	17	8	11
01.08.05	The worker processes credit memorandums. (5 task sheets, detail)	14		15
01.08.06	The worker processes credit information request. (3 task sheets, detail)	14	2	15
01.08.07	The worker answers charge account billing inquiries. (2 task sheets semi-detail)	15	12	10
01.08.08	The worker updates delinquent account lists. (1 task sheet)	14	1	15
01.08.09	The worker determines extension of additional credit. (1 task sheet, semi-detail)	18	2	10
01.08.10	The worker compiles delinquent receipts report from a computer printout, amounts of paper sold, and cash receipts. (1 task sheet)	15		15
01.08.11	The worker verifies wire request of amount due a customer. (1 task sheet)	16	1	11
01.09.	Disbursements			
01.09.01	The worker prepares disbursements from customer accounts. (12 task sheets, semi-detail)	18		10
01.09.02	The worker prepares disbursement of funds. (11 task sheets, detail)	9	1	10
01.09.03	The worker prepares disbursement of petty cash funds. (4 task sheets, semi-detail)	17		12

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
02. INTERNAL SERVICES				
02.01. Mailing				
02.01.01	The worker processes departmental incoming mail. (99 task sheets, detail)	15	1	12
02.01.02	The worker prepares daily bulk mailings. (28 task sheets, semi-detail)	14		15
02.01.03	The worker sorts materials such as invoices, purchase orders, statements, checks, and contracts. (25 task sheets)	14	1	13
02.01.04	The worker processes company outgoing mail. (22 task sheets, semi-detail)	13		15
02.01.05	The worker performs mailroom duties. (19 task sheets, semi-detail)	15		14
02.01.06	The worker operates an addressing machine. (task sheets, semi-detail)	10		21
02.01.07	The worker delivers incoming and outgoing mail. (16 task sheets, semi-detail)	13	2	12
02.01.08	The worker delivers materials such as supplies, blueprints, and product samples. (12 task sheets, semi-detail)	13	1	11
02.01.09	The worker processes incoming mail such as bank forms and checks. (11 task sheets, detail)	14		13
02.01.10	The worker processes incoming hospital mail. (9 task sheets, detail)	14		12
02.01.11	The worker arranges routing of publications. (8 task sheets)	16	1	12
02.01.12	The worker delivers mail/account documents to the post office company branches. (7 task sheets)	13		12
02.01.13	The worker processes requests for standard product information. (6 task sheets)	15	2	12
02.01.14	The worker processes departmental outgoing mail. (6 task sheets, semi-detail)	15		12
02.01.15	The worker processes certified, special delivery, and registered mail. (6 task sheets, semi-detail)	15		13
02.01.16	The worker processes interoffice mail. (6 task sheets)	14		12
02.01.17	The worker packages items for mailing. (5 task sheets)	12		17
02.01.18	The worker attaches incoming mail to files for processing. (4 task sheets)	11		14
02.01.19	The worker checks envelopes for additional contents with scanner. (1 task sheet)	14	1	14
02.01.20	The worker delivers batches of transactions to the vault area. (1 task sheet)	11		14

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
02.02. Filing				
02.02.01	The worker processes requests for records or files. (120 task sheets, detail)	15	3	12
02.02.02	The worker updates files. (43 task sheets, semi-detail)	15	1	12
02.02.03	The worker files materials such as legal, personnel, and purchasing documents. (41 task sheets, semi-detail)	13	1	18
02.02.04	The worker processes materials for filing such as legal, personnel, and real estate documents. (35 task sheets, semi-detail)	17	1	13
02.02.05	The worker arranges ledger cards for filing or further processing. (6 task sheets, semi-detail)	15		14
02.02.06	The worker updates the central index files. (4 task sheets, semi-detail)	17	1	13
02.03. Non-Computational Recording				
02.03.01	The worker compiles reports and documents from sources such as supply lists, invoices, and outlines. (30 task sheets, detail)	19		11
02.03.02	The worker updates records and patient charts from lab reports, case histories, and other information. (28 task sheets, detail)	19		11
02.03.03	The worker updates records, schedules, and manuals. (19 task sheets, detail)	19		10
02.03.04	The worker corrects printouts, forms, and stencils. (19 task sheets, detail)	15		15
02.03.05	The worker corrects names on loan files, bank records, and insurance policies from deeds or death certificates. (1 task sheet)	16		14
02.04. Duplicating		14		18
02.04.01	The worker prepares duplicated materials. (46 task sheets, semi-detail)			
02.04.02	The worker duplicates file materials. (42 task sheets, detail)	11		20
02.04.03	The worker duplicates items for permanent records. (9 task sheets, detail)	9		19
	03. TYPING COMMUNICATION			
03.00.01	The worker types correspondence, memos, and other items from form and rough draft required by employer. (226 task sheets, detail)	10		19
03.00.02	The worker types dictation from shorthand. (172 task sheets, detail)	15		21
03.00.03	The worker types communications from dictated belt. (46 task sheets, detail)	15		21
03.00.04	The worker types reports from rough drafts. (45 task sheets, detail)	16		20
03.00.05	The worker types medical letters, forms, articles, and reports. (38 task sheets, detail)	12		21

JOB COMPETENCY

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		Knowledge	Attitude	Skill
03.00.06	The worker types statistical information from engineering specifications, lists of checks, and rate sheets. (25 task sheets, detail)	10		20
03.00.07	The worker operates a teletype machine. (19 task sheets, detail)	9		21
03.00.08	The worker answers requests by typed letters. (17 task sheets, semi-detail)	16	5	18
03.00.09	The worker types information on forms, cards, or letterheads from dictation, applications, computer listings, and other source documents. (17 task sheets, detail)	11		21
03.00.10	The worker types reports/bulletins from rough drafts and lists. (14 task sheets, detail)	11		21
03.00.11	The worker processes rough draft to duplicated material. (13 task sheets, detail)	12		20
03.00.12	The worker types addresses on labels/envelopes. (8 task sheets, semi-detail)	9		20
03.00.13	The worker prepares radio commercials from oral instructions. (2 task sheets, semi-detail)	18	5	19
03.00.14	The worker prepares translation of incoming/outgoing Spanish mail. (1 task sheet)	17	1	15
03.00.15	The worker sends telegrams. (1 task sheet, semi-detail)	14	1	15
	04. CLIENT RELATED SERVICES			
04.01.	Insurance			
04.01.01	The worker types insurance documents. (48 task sheets, detail)	10		20
04.01.02	The worker processes insurance inquiries. (41 task sheets, detail)	19	5	11
04.01.03	The worker processes insurance claims. (20 task sheets, detail)	19	4	12
04.01.04	The worker prepares reports of new business activity. (2 task sheets, semi-detail)	19	1	11
04.01.05	The worker duplicates claim stickers for insurance policy holders. (1 task sheet, semi-detail)	11		17
04.01.06	The worker processes auto club membership applications. (1 task sheet, semi-detail)	15	1	15
04.02.	Financial			
04.02.01	The worker processes over-the-counter requests and inquiries. (26 task sheets, detail)	18	8	12
04.02.02	The worker processes membership and loan applications in financial institutions such as a credit union. (17 task sheets, detail)	19	5	11
04.02.03	The worker processes new accounts, transfers of accounts, and trust accounts for customers. (8 task sheets, detail)	18	3	11
04.02.04	The worker prepares all stop payments. (5 task sheets, semi-detail)	18	1	12

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
04.02.05	The worker checks securities and amounts. (4 task sheets, semi-detail)	18	1	11
04.02.06	The worker processes estate settlements for customers. (3 task sheets, detail)	20	2	10
04.02.07	The worker prepares applications for vendor's single interest (VSI) insurance coverage. (2 task sheets, semi-detail)	18	1	11
04.02.08	The worker administers safety deposit boxes. (2 task sheets, semi-detail)	18	2	7
04.02.09	The worker checks claims for transfer, trade, or exchange of securities. (2 task sheets, semi-detail)	19		8
04.02.10	The worker compiles broker's daily exchange summary sheets. (2 task sheets)	18	1	11
04.02.11	The worker processes settlement of buy and sell orders. (2 task sheets, semi-detail)	19	1	9
04.02.12	The worker issues payment to utility companies for bills paid at bank. (1 task sheet, semi-detail)	15		13
04.02.13	The worker issues receipts for securities. (1 task sheet)	13		13
04.02.14	The worker checks numbers and amounts of securities. (1 task sheet)	16	1	14
04.02.15	The worker processes stock transactions to be delivered to another broker. (1 task sheet, semi-detail)	18	1	11
04.02.16	The worker processes trading in municipal bonds. (1 task sheet, semi-detail)	20	1	11
04.02.17	The worker processes outgoing cash letters in foreign currency. (1 task sheet, semi-detail)	20	1	12
04.02.18	The worker processes incoming cash letters from foreign correspondent banks. (1 task sheet, semi-detail)	19		10
04.02.19	The worker processes assumptions of loans on request for beneficiary statement indicating a prospective buyer. (1 task sheet, semi-detail)	20	3	11
04.02.20	The worker prepares currency for shipping orders. (1 task sheet, semi-detail)	17	1	13
04.02.21	The worker informs customers that payments made by bank to insurance company have been returned. (1 task sheet)	18	9	10
04.02.22	The worker types insurance cancellation letters. (1 task sheet, semi-detail)	10	2	20
04.02.23	The worker verifies insurance coverage and registration of the bank as legal owner of all auto installment loans. (1 task sheet, semi-detail)	18	3	12
04.02.24	The worker prepares customer payroll schedule. (1 task sheet, semi-detail)	18	1	13
04.02.25	The worker checks errors for large corporations. (1 task sheet, semi-detail)	19	1	13

JOB COMPETENCY

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		Knowledge	Attitude	Skill
04.02.26	The worker issues savings certificates. (1 task sheet, semi-detail)	15		14
04.02.27	The worker processes savings certificates to be redeemed. (1 task sheet, semi-detail)	15		13
04.02.28	The worker prepares travelers checks for customers. (1 task sheet, semi-detail)	15	2	15
04.02.29	The worker prepares Christmas club coupons for customers. (1 task sheet, semi-detail)	15	2	15
04.02.30	The worker obtains permission to grant 30-day credit accounts to potential customers. (1 task sheet)	19	7	6
04.03.	Education	8		20
04.03.01	The worker types educational lists, schedules, letters, and reports. (27 task sheets, detail)			
04.03.02	The worker processes requests in person or by telephone. (12 task sheets, detail)	15	11	10
04.03.03	The worker compiles school records. (10 task sheets, detail)	16		12
04.03.04	The worker processes applications for new students. (8 task sheets, detail)	18	2	9
04.03.05	The worker assists in student registration. (6 task sheets, detail)	17	8	11
04.03.06	The worker receives activity funds and fees from students. (6 task sheets, semi-detail)	16	5	12
04.03.07	The worker records attendance. (4 task sheets, detail)	13		12
04.03.08	The worker checks student workers' typewritten work. (1 task sheet, semi-detail)	18	3	13
04.03.09	The worker processes applications from special learning disability program schools. (1 task sheet, semi-detail)	17	4	10
04.03.10	The worker issues permits to private trade school soliciters. (1 task sheet)	15	3	11
04.03.11	The worker processes requests for lecturers. (1 task sheet, semi-detail)	17	6	8
04.03.12	The worker processes contracts for scholarship expenses of visiting professors. (1 task sheet, semi-detail)	19	3	9
04.04.	Securities	19	1	9
04.04.01	The worker processes stock certificates. (10 task sheets, detail)			
04.04.02	The worker prepares stock forms for buying, selling, and transferring stocks. (9 task sheets, detail)	18		11
04.04.03	The worker verifies stock documents. (9 task sheets, detail)	16		10
04.04.04	The worker answers questions about securities. (6 task sheets, detail)	19	10	6

JOB COMPETENCY

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		Knowledge	Attitude	Skill
04.04.05	The worker sends wires to branch stock offices regarding time extensions of payments. (1 task sheet)	16	5	11
04.04.06	The worker processes requisitions for savings bonds. (1 task sheet, semi-detail)	17		10
04.04.07	The worker processes call bonds listed in a national publication. (1 task sheet, semi-detail)	17		10
04.04.09	The worker issues government bonds. (1 task sheet, semi-detail)	17		13
04.05.	Hotel/Motel	16	7	9
04.05.01	The worker arranges check-in of guests. (5 task sheets, semi-detail)	15		12
04.05.02	The worker records guest charges on room folios. (4 task sheets, semi-detail)	14		12
04.05.03	The worker processes incoming mail/messages. (4 task sheets, semi-detail)	16	7	10
04.05.04	The worker arranges check-out of guests. (3 task sheets, semi-detail)	16	15	6
04.05.05	The worker discusses complaints with guests and employees. (2 task sheets, semi-detail)	16	4	11
04.05.06	The worker arranges room reservations. (2 task sheets, detail)	17		12
04.05.07	The worker determines vacancies and percent of occupancy. (2 task sheets, semi-detail)	10		20
04.05.08	The worker types a function sheet from activities booked. (1 task sheet, semi-detail)	14		12
04.05.09	The worker updates hotel/motel mail rack. (1 task sheet)			
04.06.	Hospital Services	17	1	14
04.06.01	The worker performs procedures for hospital admission from lists of patients, or medical records. (10 task sheets, detail)	17	5	12
04.06.02	The worker arranges hospital discharges. (6 task sheets, detail)	16	1	14
04.06.03	The worker processes patient funds. (4 task sheets, semi-detail)	18	3	15
04.06.04	The worker prepares insurance claims for welfare clients on medicare or medicaid. (2 task sheets, semi-detail)	12	1	13
04.06.05	The worker obtains extensions on ID cards. (1 task sheet, semi-detail)	17		15
04.06.06	The worker prepares birth certificates from delivery room records. (1 task sheet, semi-detail)			
04.07.	Conferences and Meetings	20	6	7
04.07.01	The worker arranges conferences and meetings. (11 task sheets, detail)	16	1	11
04.07.02	The worker processes registration for conference participants. (2 task sheets, semi-detail)			

JOB COMPETENCY.

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		Knowledge	Attitude	Skill
04.08. Welfare and Aid				
04.08.01	The worker processes welfare assistance claims. (8 task sheets, detail)	18	5	10
04.08.02	The worker processes applications for welfare assistance. (5 task sheets, detail)	19	8	9
04.09. Repair Service				
04.09.01	The worker types service orders and reports. (13 task sheets, detail)	9		20
04.10. Library				
04.10.01	The worker processes check out/in of library materials. (3 task sheets, detail)	16	5	13
04.10.02	The worker obtains library books from call slips. (2 task sheets, semi-detail)	16	1	12
04.10.03	The worker types library index cards. (1 task sheet, semi-detail)	10		20
04.10.04	The worker assists library users in obtaining materials/books. (1 task sheet, detail)	18	8	10
04.10.05	The worker types letters requesting inter-library loans. (1 task sheet, semi-detail)	10	3	20
04.11. Miscellaneous Services				
04.11.01	The worker records items such as traffic tickets, activity reports, and press clippings. (10 task sheets, detail)	13		15
04.11.02	The worker answers miscellaneous over-the-counter or telephone requests. (8 task sheets, detail)	17	14	8
04.11.03	The worker processes ticket sales. (2 task sheets, semi-detail)	15	1	12
04.11.04	The worker prepares revised city telephone directory. (1 task sheet, semi-detail)	15		15
05. ORAL COMMUNICATION				
05.00.01	The worker processes incoming telephone calls. (160 task sheets, semi-detail)	15	12	9
05.00.02	The worker answers incoming telephone calls. (117 task sheets, detail)	14	14	10
05.00.03	The worker performs the duties of a receptionist. (50 task sheets, detail)	16	13	14
05.00.04	The worker operates a switchboard. (42 task sheets, detail)	12	12	17
05.00.05	The worker arranges schedules and patients' appointments. (18 task sheets, detail)	18	10	12
05.00.06	The worker answers telephone inquiries. (16 task sheets, detail)	17	12	9

JOB COMPETENCY

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		Knowledge	Attitude	Skill
05.00.07	The worker places local and long distance telephone calls. (14 task sheets, detail)	16	10	16
05.00.08	The worker answers questions regarding patient billing. (3 task sheets, detail)	18	16	7
05.00.09	The worker operates a paging system. (2 task sheets, semi-detail)	13	6	18
05.00.10	The worker requests repairs or maintenance of guest's room. (1 task sheet, semi-detail)	17	7	10
05.00.11	The worker arranges schedules for conference room. (1 task sheet)	17	3	9
05.00.12	The worker arranges doctor/patient conferences. (1 task sheet, semi-detail)	18	7	9
	06. ELECTRONIC DATA PROCESSING			
06.01.	Keypunching, Verifying			
06.01.01	The worker punches cards from source documents such as invoices, orders, time cards, and instructions. (96 task sheets, detail)	11		20
06.01.02	The worker operates a verifier. (40 task sheets, detail)	10		19
06.01.03	The worker operates a keytape machine punching magnetic tape. (8 task sheets)	9		19
06.01.04	The worker punches corrections in cards. (7 task sheets)	9		21
06.01.05	The worker operates optical scanner for payroll printout. (2 task sheets)	10		20
06.01.06	The worker performs quality control checks on the optical-font printing adding machine operator's tape production. (2 task sheets)	16		16
06.01.07	The worker punches cards coded for school withdrawal. (1 task sheet)	9		21
06.02.	Related Electronic Data Processing			
06.02.01	The worker checks source documents such as orders, invoices, punched cards, and printouts with computer printouts/listings. (42 task sheets, semi-detail)	20		12
06.02.02	The worker performs electronic data processing tasks from such items as computer printouts, files, accounting forms, manuals, maps, and instructions. (22 task sheets, detail)	15		17
06.02.03	The worker codes payment cards, checks, and deposit/withdrawal slips for keypunching. (4 task sheets, semi-detail)	17		13
06.02.04	The worker maintains control of input/output work flow between corporate trust department and data processing department. (2 task sheets, semi-detail)	20		12
06.02.05	The worker corrects computer rejected debits/credits. (2 task sheets, semi-detail)	18	1	14

JOB COMPETENCY

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		Knowledge	Attitude	Skill
06.02.06	The worker prepares batches of checks for data processing. (1 task sheet, semi-detail)	14		16
06.02.07	The worker types cash letters for checks drawn on bank but cashed elsewhere. (1 task sheet, semi-detail)	11		20
06.03.	Computer Operation			
06.03.01	The worker operates reproducer from punched cards, printed lists, and summary cards. (35 task sheets, semi-detail)	9		21
06.03.02	The worker operates (decollates, bursts, binds) computer output. (6 task sheets, semi-detail)	9		21
06.03.03	The worker places magnetic tapes on a computer tape drive. (4 task sheets, semi-detail)	9		21
06.03.04	The worker prepares weekly payroll from payroll tapes. (4 task sheets, semi-detail)	17		15
06.03.05	The worker verifies manually prepared totals with computer detailed totals. (4 task sheets)	16		14
06.03.06	The worker operates electronic computer and peripheral equipment. (3 task sheets, semi-detail)	10		20
06.03.07	The worker sorts batches of checks. (2 task sheets, semi-detail)	14		16
06.03.08	The worker prepares punched cards for computer run. (2 task sheets)	10		18
06.03.09	The worker determines computer malfunction by running diagnostics. (2 task sheets)	18		16
06.03.10	The worker determines accuracy of data speed machine sending installation. (1 task sheet)	19		14
06.04.	Coding			
06.04.01	The worker codes forms such as purchase orders, invoices, and applications for keypunching. (45 task sheets, semi-detail)	18		10
06.05.	Sorting, Interpreting, Collating, Reproducing, and Tabulating	10		20
06.05.01	The worker operates unit record equipment such as the sorter, reproducer, collator, and interpreter. (22 task sheets, semi-detail)			
06.05.02	The worker codes forms such as account statements, production figures, inventory listings, punched cards, wired or unwired boards for keypunching. (5 task sheets)	18		13
06.05.03	The worker operates optical scanning equipment to convert printed data to punched data. (4 task sheets)	11		19
06.05.04	The worker adjusts errors on computer input tape. (1 task sheet)	19		14
06.06.	Computer Programming	20		13
06.06.01	The worker writes computer programs. (18 task sheets, detail)			

JOB COMPETENCY

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		Knowledge	Attitude	Skill
06.06.02	The worker checks computer programs. (4 task sheets, semi-detail)	20		12
06.06.03	The worker writes computer program in final form. (3 task sheets, semi-detail)	20		12
06.06.04	The worker adjusts present computer programs. (1 task sheet, semi-detail)	20	1	14
06.06.05	The worker punches prescribed program changes for new computer. (1 task sheet, semi-detail)	13		18
06.06.06	The worker arranges a time schedule for a new computer program. (1 task sheet, semi-detail)	20	1	12
	07. PERSONNEL			
07.00.01	The worker processes employment applications. (68 task sheets, detail)	17	5	9
07.00.02	The worker updates personnel files from changes received. (54 task sheets, detail)	17	1	10
07.00.03	The worker arranges orientation of new employees. (37 task sheets, detail)	19	7	6
07.00.04	The worker administers employment tests to applicants. (36 task sheets, semi-detail)	19	6	9
07.00.05	The worker types personnel reports from such documents as personnel lists, appointment cards, and rough drafts. (35 task sheets, detail)	11		21
07.00.06	The worker types personnel letters, forms, and cards from documents such as rough draft letters, employment forms, and claim forms. (25 task sheets, detail)	10		21
07.00.07	The worker compiles payroll information from absentee reports, union cards, and requests for leave. (23 task sheets, detail)	17		13
07.00.08	The worker compiles new employee personnel data from employment forms, questionnaire work sheets, and applications. (21 task sheets, detail)	17	2	13
07.00.09	The worker arranges travel. (18 task sheets, detail)	20	2	9
07.00.10	The worker processes travel vouchers. (10 task sheets, detail)	16		13
07.00.11	The worker arranges transportation from city car pool. (2 task sheets, semi-detail)	18	3	8
07.00.12	The worker processes merit award papers and pins. (2 task sheets)	15	2	13
07.00.13	The worker assists in labor grievances. (2 task sheets)	21	8	7
07.00.14	The worker issues working papers to students. (2 task sheets)	16	2	14
07.00.15	The worker issues parking permits. (1 task sheet)	15	3	15
07.00.16	The worker issues employee pass cards. (1 task sheet)	15	2	15
07.00.17	The worker issues student work permits. (1 task sheet)	14	2	15
07.00.18	The worker issues social security cards. (1 task sheet)	14	2	15
07.00.19	The worker administers driver tests. (1 task sheet)	18	8	15

JOB COMPETENCY

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		Knowledge	Attitude	Skill
07.00.20	The worker arranges annual awards meetings. (1 task sheet)	20	4	6
07.00.21	The worker issues entertainment tickets. (1 task sheet)	14	2	14
07.00.22	The worker discusses labor contract provisions. (1 task sheet)	20	12	6
07.00.23	The worker assists in union/management meetings. (1 task sheet)	17	14	6
07.00.24	The worker administers highway safety program for salesmen. (1 task sheet)	21	4	8
07.00.25	The worker requests student nurses' health examination appointments. (1 task sheet, semi-detail)	15	3	10
07.00.26	The worker updates personnel forms. (1 task sheet, semi-detail)	15		13
07.00.27	The worker administers an orientation program for new hospital employees. (1 task sheet, semi-detail)	20	9	9
	08. SALES			
08.00.01	The worker processes sales documents such as charge slips, purchase orders, warrants. (30 task sheets, detail)	15		13
08.00.02	The worker processes requests by telephone and over the counter. (25 task sheets, detail)	15	10	9
08.00.03	The worker types correspondence from dictation, incoming mail, and other source documents. (24 task sheets, detail)	13		20
08.00.04	The worker types sales items from rough drafts, proposals, lists, and other source documents. (19 task sheets, detail)	11		21
08.00.05	The worker types orders, memos, and invoices. (16 task sheets, semi-detail)	9		21
08.00.06	The worker arranges layouts for classified ads. (14 task sheets, semi-detail)	19	2	13
08.00.07	The worker answers customer complaints. (13 task sheets, detail)	21	13	7
08.00.08	The worker processes classified ads and ad complaints. (12 task sheets, detail)	18	9	9
08.00.09	The worker processes customer orders. (10 task sheets, detail)	17	1	13
08.00.10	The worker records orders, printouts, and changes. (9 task sheets, semi-detail)	16	1	13
08.00.11	The worker updates manuals, catalogs, price lists, and customer accounts. (9 task sheets, semi-detail)	17		11
08.00.12	The worker composes memos, responses, and TV commercials. (8 task sheets, semi-detail)	20	9	11
08.00.13	The worker prepares price quotations for customers and salesmen. (8 task sheets, detail)	20		11
08.00.14	The worker requests new or extended advertising orders. (7 task sheets, semi-detail)	20	5	8

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
08.00.15	The worker arranges schedules for TV/radio commercials. (5 task sheets, semi-detail)	21	1	8
08.00.16	The worker mails product information and advertising materials to customers, prospective customers. (4 task sheets, semi-detail)	16		13
08.00.17	The worker processes supply requisitions for company salesmen. (2 task sheets, detail)	15		14
08.00.18	The worker prepares new customer plates on graphotype machine. (1 task sheet, semi-detail)	13		19
08.00.19	The worker records machine moves from installation transmittals. (1 task sheet)	13		15
08.00.20	The worker checks unfilled and back orders. (1 task sheet)	19		10
08.00.21	The worker completes forms for installation of business equipment delivered. (1 task sheet)	17		13
08.00.22	The worker arranges travel for employees' speaking engagements. (1 task sheet)	21	3	6
08.00.23	The worker operates microfilmer on all detail tickets, charge slips, and returned merchandise. (1 task sheet)	12		18
08.00.24	The worker files advertisements from clipping agency. (1 task sheet)	12		16
08.00.25	The worker prepares dummy for new books to be published. (1 task sheet, semi-detail)	18		10
08.00.26	The worker assists committees in public relations activities. (1 task sheet, semi-detail)	20	8	7
08.00.27	The worker processes lay-away tickets and merchandise. (1 task sheet)	15		13
08.00.28	The worker calls businesses for report of company's goods sold or monies collected. (1 task sheet)	17	1	6
08.00.29	The worker arranges for a commercial photographer to take pictures of equipment manufactured. (1 task sheet)	17	3	8
08.00.30	The worker arranges sample display for salesmen or customers. (1 task sheet)	18	1	13
08.00.31	The worker informs customer or insurance coverage. (1 task sheet)	19	10	7
08.00.32	The worker arranges sales plan for department store yearly sales. (1 task sheet)	21	1	7
	09. INVENTORY, SHIPPING, RECEIVING			
09.01.	Inventory			
09.01.01	The worker processes orders from inventory. (24 task sheets, detail)	15		14
09.01.02	The worker updates inventory records from office supply inventory documents. (24 task sheets, detail)	15		13

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
09.01.03	The worker records finished-goods inventory from production and shipping data. (8 task sheets, semi-detail)	14		15
09.01.04	The worker completes physical inventory. (6 task sheets, semi-detail)	16		12
09.01.05	The worker maintains inventory records on stock sent to production. (4 task sheets)	16		14
09.01.06	The worker compiles revised inventory descriptions periodically. (1 task sheet)	17		11
09.01.07	The worker proofreads semi-automated stock reports for keypunching. (1 task sheet)	15		16
09.01.08	The worker transfers stock from warehouse supplies to substore. (1 task sheet)	16		12
09.01.09	The worker prepares inventory report for salesmen. (1 task sheet)	17		13
09.02.	Shipping			
09.02.01	The worker types shipping manifest/bills of lading, and waybills. (9 task sheets)	10		19
09.02.02	The worker arranges delivery routes. (7 task sheets, detail)	17	1	11
09.03.03	The worker processes shipping and billing forms on completed jobs. (6 task sheets, detail)	14		14
09.03.04	The worker verifies contents of outbound shipments. (6 task sheets, detail)	18		9
09.03.05	The worker checks undelivered shipments. (5 task sheets, detail)	16	1	12
09.03.06	The worker sends letter/teletype to customer regarding merchandise shipment. (3 task sheets)	16	3	17
09.03.07	The worker distributes shipment listings. (3 task sheets)	15		13
09.02.08	The worker records shipments. (3 task sheets)	14		14
09.02.09	The worker completes shipping reports. (1 task sheet)	15		13
09.03.	Receiving			
09.03.01	The worker records inbound shipments. (9 task sheets, detail)	13		14
09.03.02	The worker arranges expediting of inbound shipments. (4 task sheets, semi-detail)	16		12
09.03.03	The worker issues a claim or an adjustment against the carrier/supplier for damaged/short/overshipments. (3 task sheets)	17	4	13
09.03.04	The worker processes damage claims. (2 task sheets)	17	3	13
09.03.05	The worker processes freight bills for payment. (1 task sheet)	15		14
09.03.06	The worker arranges return of leased machinery. (1 task sheet)	17	1	7
09.03.07	The library worker determines disposition of incoming books. (1 task sheet, semi-detail)	19		10

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
	10. PURCHASING			
10.00.01	The worker maintains supplies and stock inventory. (94 task sheets, detail)	16		13
10.00.02	The worker types purchasing documents. (30 task sheets, detail)	11		21
10.00.03	The worker arranges expediting of purchase shipments. (5 task sheets, semi-detail)	19		9
10.00.04	The worker administers purchase and sale of stamps for hospital and patients. (1 task sheet)	17		11
	11. PRODUCTION			
11.00.01	The worker processes schedules and adjustment of scheduled production orders. (23 task sheets, detail)	18		11
11.00.02	The worker types production reports. (16 task sheets, detail)	9		20
11.00.03	The worker discusses production problems with potential customers. (1 task sheet, semi-detail)	16	14	7
	12. MISCELLANEOUS			
12.00.01	The worker completes minor repairs and maintenance of duplicating machines. (6 task sheets)	13		17
12.00.02	The worker operates collator. (4 task sheets)	8		20
12.00.03	The worker completes binding and padding of printed forms. (3 task sheets)	11		17
12.00.04	The worker arranges for supply and movement of equipment requested. (3 task sheets)	17	1	10
12.00.05	The worker performs time and motion studies. (3 task sheets)	21	2	10
12.00.06	The worker arranges graphic display of test results. (3 task sheets)	18	1	12
12.00.07	The worker completes tests and reports of company products. (3 task sheets)	20		9
12.00.08	The worker arranges reception room and coffee serving for employees and guests. (3 task sheets)	16	4	10
12.00.09	The worker delivers vouchers or other special documents. (2 task sheets)	13		13
12.00.10	The worker processes delinquent auto loan collections. (2 task sheets)	14	3	15
12.00.11	The worker prepares drawings of buildings or rocket engines. (2 task sheets)	20	1	12
12.00.12	The worker determines process for new product. (1 task sheet)	20	1	9
12.00.13	The worker discusses handling of franchise contracts. (1 task sheet)	21	8	7
12.00.14	The worker packages financial records for permanent storage. (1 task sheet)	15		12

JOB COMPETENCY

Please examine each competency to determine whether the competency is knowledge, skill or attitude and check (✓) the appropriate column.

		Knowledge	Attitude	Skill
12.00.15	The worker calls doctors, hospitals, police, fire department, and insurance carrier in emergencies. (1 task sheet)	17	12	9
12.00.16	The worker operates lost and found department. (1 task sheet)	16	6	9
12.00.17	The worker prepares bill of materials from blueprints. (1 task sheet)	19		11
12.00.18	The worker arranges format of computer output sheets. (1 task sheet)	20		13
12.00.19	The worker assists technicians such as electricians, plumbers, and painters. (1 task sheet)	18	3	15
12.00.20	The worker operates a tag machine for pricing merchandise. (1 task sheet)	11		17
12.00.21	The worker operates gift wrapping service for customers. (1 task sheet)	13	5	16
12.00.22	The worker checks phonograph records. (1 task sheet)	12		15
12.00.23	The worker codes meter readings for utility billings. (1 task sheet)	17		11
12.00.24	The worker assists in wind tunnel tests. (1 task sheet)	18		15
12.00.25	The worker processes labels by dating, sorting, and filing. (1 task sheet)	15		15

APPENDIX C-4

NOBELS Competencies By Subject Area

SINESS SUBJECT COMMUNICATION

Knowledge	Skill	Attitude
	Accounts Receivable	
01.01.04 01.01.09 01.01.11		
	TYPING COMMUNICATION	
	03.00.13	
	Education	
04.03.02		
	Hotel/Motel	
04.05.05		04.05.05
	Miscellaneous Services	
04.11.02		04.11.02
	ORAL COMMUNICATION	
05.00.01		05.00.01
05.00.02		05.00.02
05.00.03		05.00.03
	05.00.04	05.00.04
05.00.05		05.00.05
05.00.06		05.00.06
05.00.07	05.00.07	05.00.07
05.00.08		05.00.08
	05.00.09	
	SALES	
08.00.07		08.00.07
	Receiving	
	09.03.06	

BUSINESS SUBJECT DATA ENTRY (High School)

Knowledge	Skill	Attitude

Computer Operation

06.03.08

NESS SUBJECT DATA PROCESSING

Knowledge	Skill	Attitude
	Payroll	
	01.03.05	
	Keypunching, Verifying	
	06.01.01	
	06.01.02	
	06.01.03	
	06.01.04	
	06.01.05	
06.01.06	06.01.06	
	06.01.07	
	Related Electronic Data Processing	
06.02.01		
	06.02.02	
06.02.03		
06.02.04		
06.02.05		
	06.02.06	
	Computer Operation	
	06.03.01	
	06.03.02	
	06.03.03	
06.03.04		
06.03.05		
	06.03.06	
	06.03.07	
	06.03.08	
06.03.09		
06.03.10		
	Coding	
06.04.01		
	Sorting, Interpreting, Collating, Reproducing, Tabulating	
06.05.02		
	06.05.03	

BUSINESS SUBJECT DATA PROCESSING (Continued)

Knowledge	Skill	Attitude
	Computer Programming	
06.06.01		
06.06.02		
06.06.03		
06.06.04		
	06.06.05	
06.06.06		
	MISCELLANEOUS	
12.00.18		

NESS SUBJECT MACHINE TRANSCRIPTION (Community Colleges/Technical Institutes)

Knowledge	Skill	Attitude

TYPING COMMUNICATION

03.00.03

BUSINESS SUBJECT MACHINES

Knowledge	Skill	Attitude
	Computing and Checking	
	01.04.02	
	01.04.04	
01.04.05		
	01.01.06	
01.04.09		
	Mailing	
	02.01.06	
	TYPING COMMUNICATION	
	03.00.07	
	Insurance	
	04.01.05	
	Keypunching, Verifying	
	06.01.03	
	MISCELLANEOUS	
	12.00.02	

NESS SUBJECT MATHEMATICS

Knowledge	Skill	Attitude
	Payroll	
01.03.08		
	Receipts	
01.05.06		

BUSINESS SUBJECT OFFICE OCCUPATIONS (High School)

Knowledge	Skill	Attitude
	Payroll	
01.03.01		
01.03.07		
	Mailing	
02.01.01		
	02.01.02	
02.01.03		
	02.01.04	
02.01.05		
02.01.07		
02.01.09		
02.01.10		
02.01.14		
02.01.15		
02.01.16		
	02.01.18	

NESS SUBJECT OFFICE PROCEDURES (Community Colleges/Technical Institutes)

Knowledge	Skill	Attitude
	Credit	
	01.08.01	
	Mailing	
02.01.01		
	02.01.02	
02.01.03		
	02.01.04	
02.01.05		
02.01.07		
02.01.08		
02.01.09		
02.01.10		
02.01.11		
02.01.13		
02.01.14		
02.01.15		
02.01.16		
	02.01.17	
	02.01.18	
02.01.19	02.01.19	
	02.01.20	
	Non-Computational Recording	
02.03.01		
	Duplicating	
	02.04.01	
	Education	
04.03.06		
	Securities	
04.04.01		
	Hotel/Motel	
04.05.03		
	Hospital Services	
04.06.01		

BUSINESS SUBJECT OFFICE PROCEDURES (Continued)

Knowledge	Skill	Attitude
	Conferences and Meetings	
04.07.01		
04.07.02		
	Miscellaneous Services	
04.11.02		04.11.02
	ORAL COMMUNICATION	
05.00.03		05.00.03
	05.00.04	05.00.04
05.00.05		05.00.05
05.00.06		05.00.06
05.00.07	05.00.07	05.00.07
05.00.08		05.00.08
05.00.11		
05.00.12		
	PERSONNEL	
07.00.03		
07.00.04		
07.00.08		
07.00.09		
07.00.10		
07.00.11		
07.00.12		
07.00.14		
07.00.25		
	SALES	
08.00.01		
08.00.02		08.00.02
08.00.08		
08.00.11		
08.00.14		
08.00.16		
08.00.17		
08.00.21		
08.00.22		
08.00.27		
08.00.28		
08.00.29		
08.00.31		08.00.31

Knowledge	Skill	Attitude
	Shipping	
09.02.07		
	Receiving	
09.03.03 09.03.04 09.03.05 09.03.07		
	MISCELLANEOUS	
12.00.08 12.00.16		

BUSINESS SUBJECT RECORDKEEPING

Knowledge	Skill	Attitude
	Accounts Receivable	
01.01.02		
01.01.03		
01.01.05		
01.01.06		
01.01.07		
01.01.08		
	Accounts Payable	
01.02.01		
01.02.02		
01.02.03		
	Payroll	
01.03.01		
	01.03.02	
01.03.03		
01.03.04		
01.03.06		
01.03.07		
01.03.08		
01.03.09		
01.03.10		
01.03.11		
01.03.12		
	Computing and Checking	
01.04.01		
	01.04.02	
	01.04.03	
	01.04.04	
01.04.05		
	01.04.06	
	01.04.08	
01.04.09		
01.04.10		
01.04.11		
01.04.12		

BUSINESS SUBJECT RECORDKEEPING (Continued)

Knowledge	Skill	Attitude
	Receipts	
01.05.02		
	01.05.03	
	01.05.04	
	01.05.05	
01.05.06		
01.05.07		
01.05.08		
	Financial Entries	
01.06.01		
01.06.02		
	01.06.03	
	01.06.04	
01.06.05		
01.06.06	01.06.06	
01.06.07		
	Cost Accounting	
01.07.01		
	Disbursements	
01.09.01		
01.09.02		
01.09.03		
	Financial	
04.02.12		
04.02.24		
	Miscellaneous Services	
	04.11.01	
	Inventory	
09.01.05		

BUSINESS SUBJECT RECORDS MANAGEMENT (Filing)

Knowledge	Skill	Attitude
	Filing	
02.02.01		
02.02.02		
	02.02.03	
02.02.04		
02.02.05		
02.02.06		

BUSINESS SUBJECT SHORTHAND

Knowledge	Skill	Attitude

TYPING COMMUNICATION

03.00.01

BUSINESS SUBJECT SIMULATED OFFICE

Knowledge	Skill	Attitude
	Accounts Receivable	
	01.01.01	
01.01.04		
01.01.07		
01.01.09		
01.01.11		
	Payroll	
01.03.01		
	Mailing	
02.01.01		
	02.01.02	
02.01.03		
	02.01.04	
02.01.05		
02.01.07		
02.01.08		
02.01.09		
02.01.10		
02.01.11		
02.01.14		
02.01.15		
02.01.16		
	02.01.17	
	Conferences and Meetings	
04.07.01		
	ORAL COMMUNICATION	
05.00.03		05.00.03
05.00.05		05.00.05
05.00.06		05.00.06
05.00.07		05.00.07

BUSINESS SUBJECT TYPEWRITING

Knowledge	Skill	Attitude

Accounts Receivable

01.01.01

Cost Accounting

01.07.04

TYPING COMMUNICATION

03.00.01
03.00.02
03.00.03
03.00.04
03.00.05
03.00.06
03.00.08
03.00.09
03.00.10
03.00.11
03.00.12

Insurance

04.01.01

Financial

04.02.22

Education

04.03.01

Hotel/Motel

04.05.08

Repair Services

04.09.01

Library

04.10.03
04.10.05

BUSINESS SUBJECT TYPEWRITING (Continued)

Knowledge	Skill	Attitude

Related Electronic Data Processing

06.02.07

PERSONNEL

07.00.05
07.00.06

SALES

08.00.03
08.00.04
08.00.05

Shipping

09.02.01

PURCHASING

10.00.02

PRODUCTION

11.00.02

COMPETENCIES WERE NOT IDENTIFIED

FOR FOLLOWING COURSES

DYNAMICS (High School)

ECONOMICS

LAW

MANAGEMENT (Principles)

PERSONAL DEVELOPMENT (Community College/Technical Institute)

WORD PROCESSING

INTRODUCTION TO BUSINESS

ACCOUNTING was identified as an additional subject by some respondents.

APPENDIX D-1

Equipment List - Office Machines

OFFICE MACHINES LABORATORY*

EQUIPMENT LIST

Quantity	Description
1	Instructor's Desk
1	Instructor's Chair/Steno Chair
30	Student Table/Desk
30	Student Chair
6	Typewriting Desk, adjustable
6	Steno-Chair, adjustable
6	Typewriter, electric
6	Transcribing Machine
8	Adding and Subtracting Machine, electric (optional)
6	Adding and Subtracting Machine, full-keyboard, electric
6	Calculating Machine, electric
6	Calculator, electronic printing
6	Calculator, electronic display
6	Calculator, electric (Rotary if used locally)
1	Dry Process Duplicator
2	Mimeoscope
1	Spirit Duplicator, electric
3	File Cabinet
2	Storage Cabinet

*Indicates the minimum items required for 30 students to furnish basic support to the program. Machines selected should be machines used in local community (based on surveys). Prices are not listed and items may or may not be on state contract.

Quantity	Description
1	Paper Cutter
2	Accounting/Posting Machine w/type (optional)
1	Accounting Machine, complete w/stand
1	Photo-Copies Machine
1	Off-Set Duplicator (optional)
1	Executive Typewriter, 15" carriage
2	Artist Kit including lettering guide and style pens for mimeoscope
6	Typewriter, non-typebar design w/simulator
8	Calculator, portable hand
1	Automatic Typewriter, non-typebar design (tape drive)
1	Decimal Tabular Typewriter, 16" carriage
1	Posting Tub, metal box for legal size folders
3	Calculator, electronic programmable printing (Printing, statistical and/or scientific)
1	Input/Output Writer (Compatible w/electronic programmable calculator)
1	Card Reader, mark sense
1	Memory Typewriter
1	Keypunch Machine (printing) - (optional)
1	Micro-Computer System (optional)

Quantity	Description
1	Stop Watch
2-15	Timer (More than one may be needed for skills or audio-visual-tutorial laboratories)
1	Posting Tub, metal box for letter size folders

APPENDIX D-2

Equipment List - Secretarial

SECRETARIAL LABORATORY*

EQUIPMENT LIST

Quantity	Description
1	Instructor's Desk
1	Instructor's Chair/Steno-Chair
30	Carrel, w/file drawer and table for typewriter
30	Steno-Chair
30	Typewriter, 13" carriage, electric w/pad
1	Combination Dictation and Transcribing Machine, complete
30	Transcribing Machine
1	Stop Watch
2-15	Timer (More than one needed for skills or audiovisual-tutorial laboratories)
2	Storage Cabinet
4	Filing Cabinet
1	Transcribing Multiple Listening System, complete for 30 student stations
1	Cabinet for tapes
1	Cabinet for records
1	Filmstrip Projector System w/screen for each carrel
1	Slide Projector

dicates the minimum items required for 30 students to furnish basic
pport to the program. Prices are not listed and items may or may
t be on state contract.

Quantity	Description
1	Telephone with hold/extension lines - teletrainer kit
1	Automatic Typewriter, non-typebar design (tape drive)
1	Automatic Typewriter, non-typebar design (card drive)
1	Posting Tub, metal box for letter size folders
1	Posting Tub, metal box for legal size folders
1	Correcting Typewriter, non-typebar design with or without dual pitch and/or more durable ribbon
1	Correcting Typewriter, non-typebar design with or without dual pitch
1	Memory Typewriter
1 (for each machine)	Security Device for business machines
2	Attendance Recorders - needed only for audiovisual tutorial laboratory or skills laboratory

APPENDIX D-3

Equipment List - Typewriting

TYPING LABORATORY*

EQUIPMENT LIST

Quantity	Description
1	Instructor's Desk
1	Instructor's Chair/Steno-Chair
30	Typewriting Desk, adjustable
30	Steno Chair
30	Typewriter, 13" electric w/pad
30	Typing Book Holder
2	Filing Cabinet
1	Storage Cabinet
2-15	Timer (More than one may be needed for skills or audio-visual-tutorial laboratories)
1	Demonstration Stand
1	Table (all purpose)
1	F.A.B.E. Typing Pacer
1	Stop Watch
	Audiovisual Tutorial Typing System
12	Model SS-48 LRC - 1G Student Stations
1	BTT-100 IBM Selectric Supplement
3	Typing I (BTL-100) IBM Intro. Typing
2	Typing II (BTL-101) Intermediate Typing
1	Typing III (BTL-102) Advanced Typing

*Indicates the minimum items required for 30 students to furnish basic support to the program. Prices are not listed and items may or may not be on state contract.

Quantity	Description
1	Posting Tub, metal box for letter size folders
1	Posting Tub, metal box for legal size folders
1	Correcting Typewriter, non-typebar design with or without dual pitch and/or more durable ribbon
1	Correcting Typewriter, non-typebar design with or without dual pitch
1	Memory Typewriter

APPENDIX E-1

Curriculum Model - Secretarial

SECRETARIAL*

(Curriculum Model)

Course Title	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
FIRST QUARTER (Fall)			
BUS 101 Introduction to Business	3	2	4
BUS 102 Typewriting I	2	3	3
BUS 106 Shorthand I	3	2	4
BUS 109 Business Mathematics	5	0	5
ENG 101 Grammar	3	0	3
	16	7	19
SECOND QUARTER (Winter)			
BUS 103 Typewriting II	2	3	3
BUS 107 Shorthand II	3	2	4
BUS 110 Office Machines I	2	2	3
BUS 115 Business Law I	3	0	3
BUS 183 Business Terminology and Vocabulary	2	2	3
ENG 102 Composition	3	0	3
	15	9	19
THIRD QUARTER (Spring)			
BUS 104 Typewriting III	2	3	3
BUS 112 Records Management	2	2	3
BUS 108 Shorthand III	3	2	4
BUS 120 Accounting I	3	2	4
ECO 102 Economics I	3	0	3
ENG 206 Business Communication	3	0	3
	16	9	20
FOURTH QUARTER (Summer)			
PSY 231 Personal Development	3	0	3
BUS 204 Typewriting IV	2	3	3
BUS 206 Shorthand Dictation and Transcription I	3	2	4
BUS 214 Office Procedures	3	0	3
EDP 104 Survey of Data Processing Systems	3	2	4
Social Science Elective	3	0	3
	17	7	20

*Students specializing in legal, medical, educational, engineering/technical or other specialty areas should be given problems, materials, courses and instruction related to the area. Example: Typewriting, Criminal Law and Human Anatomy and Physiology.

		Hours Per Week		Quarter Hours
		Lecture	Lab	Credit
FIFTH QUARTER (Fall)				
BUS 204	Oral Communication or Social Science Elective	3	0	3
BUS 205	Typewriting V	2	3	3
BUS 207	Shorthand Dictation and Transcription II	3	2	4
BUS 210	Office Machines II	2	2	3
*BUS 273	Word Processing	5	4	7
		18	11	20
SIXTH QUARTER (Winter)				
BUS 208	Shorthand Dictation and Transcription III	3	2	4
BUS 211	Machine Dictation and Transcription I	2	2	3
BUS 215	Secretarial Office Application (Simulation)	1	10	6
or		or		
BUS 215	Secretarial Office Application (Cooperative)	1	9	4
TOTAL WITH SIMULATION		85	57	111
TOTAL WITH COOPERATIVE EDUCATION		85	56	109

*Utilization of complete word processing center concept is recommended. However, if concept is not being used in local community, introductory course is recommended (3-0-3). Skill courses in typewriting, machines or dictation and transcription could be deleted if full concept is used.

COURSE DESCRIPTIONS BY QUARTERS

FIRST QUARTER	Hours Per Week: Class	Hours Per Week: Lab	Quarter Hours Credit
BUS 101 Introduction to Business	3	2	4

A survey of the business world that introduces the student to the history of United States business, organization and administration, production, accounting, statistics, management, marketing, finance and business law.

BUS 102 Typewriting I	2	3	3

The student will be introduced to the touch typewriting system and will learn to use proper typing techniques, master the keyboard, type personal letters and postal cards and be able to tabulate. Upon completion of the course the student will be able to type 30 words per minute for three minutes.

BUS 106 Shorthand I	3	2	4

Shorthand I is designed to prepare the student in the theory and practice of reading and writing shorthand. Emphasis is on penmanship, phonetics, word families, brief forms and phrases.

BUS 109 Business Mathematics	5	0	5

This course was designed to provide a review of the fundamentals of arithmetic and their practical application to business problems in the processes of trading, operating, ownership, financing, investing, summarizing and analyzing. Topics covered include cash and trade discounts, markup, interest, taxes and pertinent uses of mathematics in business and industry.

ENG 101 Grammar	3	0	3

Designed to aid the student in the improvement of self-expression through writing. Emphasis is on grammar, diction, sentence structure, punctuation and spelling. It is intended to stimulate students in applying the basic principles of English grammar in their day-to-day situations in industry and social life.

SECOND QUARTER

BUS 103 Typewriting II	2	3	3

The student will develop speed and accuracy in typing with further mastery of correct typewriting techniques. These skills and techniques will be applied in tabulation, manuscript and correspondence. Upon completion of the course, the student will be able to type a minimum of 40 words per minute for five minutes.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 107 Shorthand II	3	2	4

The student will improve his/her ability to apply the theory and principles of shorthand. Daily practice in reading and writing shorthand will be provided. The student will also learn the shorthand outlines and two-letter post office abbreviations for 50 states.

BUS 110 Office Machines I	2	2	3

The student will be introduced to machines currently being used in business and industry. The student will receive training in the basic principles, operating procedures and busines applications of machines such as the ten-key adding machine, the electronic calculator (printing and display), the printing calculator and the full keyboard adding machine. Primary emphasis is on mastery of the touch system for all ten-key machines, with extensive coverage of electronic calculators.

BUS 115 Business Law I	3	0	3

This course is designed for students who need an understanding of substantive business law. The student will be able to define business law terminology and state involvement of business law in the following areas: nature and source of our legal system, contracts, sales, commercial papers, bailments and agency.

BUS 183 Business Terminology and Vocabulary	2	2	3

The student will develop proficiency in spelling, definitions, word usage, terminology and use of the dictionary as used in business, technical and professional offices.

ENG 102 Composition	3	0	3

English Composition is designed to aid the student in improvement of self-expression by means of practical application in business and technical writing. Emphasis is on writing sentences, paragraphs and compositions.

THIRD QUARTER

BUS 104 Typewriting III	2	3	3

The student will develop skill in typing production problems with emphasis on the student's ability to function as an expert typist, producing mailable copies. Production units will include tabulation, manuscript, correspondence and business forms. The student will also practice speed building and type a minimum of 50 words per minute for five minutes.

BUS 112 Records Management	2	2	3

The student will be able to apply the fundamentals of indexing and filing and realize the importance of filing as a basic tool of management. Theory and practice will be combined by the use of miniature letters, filing boxes and guides. Topics include alphabetic, numeric, geographic, subject and subject-decimal filing systems.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 108 Shorthand III	3	2	4

The student will improve his/her ability to apply theory and principles of shorthand and build speed in taking shorthand-dictation. Emphasis will be on office-style dictation, development of speed in dictation and accuracy in transcription.

BUS 120 Accounting I 3 2 4

The student will apply the basic functions, techniques, principles and concepts of accounting. Emphasis is on business transactions and their effect on the accounting equation; debits and credits in double-entry accounting; selecting and recording financial data in journals and ledgers; preparing work sheets; balance sheets and income statements and introduction to the basic concepts of internal control.

ECO 102 Economics I 3 0 3

This course is specifically designed to create an awareness of the economic decisions that are made daily by individuals and groups in society. Emphasis is primarily on general economics for citizenship; and generally on politics, history, sociology, etc. The course provides a foundation for further study in economics but is also designed for the student who may not have another economics course.

ENG 206 Business Communication 3 0 3

The course is designed to develop skill in writing business communication. Emphasis is placed on the types of business communication--response and reply letters, sales letters, credit letters, application letters, inter-office memorandums, minutes of meetings, etc.--used in business and industry.

FOURTH QUARTER

BUS 204 Typewriting IV (Advanced Typewriting) 2 3 3

The student learns the techniques needed in planning and in typing projects based on tasks performed by typists in business and industry. The student will be required to produce a reasonable amount of work within a given time period. Projects will include: letter forms, methods of duplication, statistical tabulation, typing of reports, manuscripts and legal documents, etc.

BUS 206 Shorthand Dictation and Transcription I 3 2 4

The student will improve in the skill of taking dictation and of transcribing at the typewriter materials appropriate to an office. Topics will include a review of theory and the dictation of familiar and unfamiliar material at varying rates of speed.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 214 Office Procedures	3	0	3

Designed to acquaint the student with the responsibilities encountered by an office worker in today's office. Some responsibilities discussed include: receptionist duties, handling the mail, telephone techniques, travel information, office records, purchasing of supplies, office organization and job applications.

EDP 104 Survey of Data Processing Systems	3	2	4

The student will develop a basic knowledge of the fundamental concepts and operational principles of data processing systems. Topics covered include: history of data processing, operating characteristics of computers, data processing terminology and the role of computers in business and industry. (This course is a prerequisite for all programming courses.)

PSY 231 Personal Development	3	0	3

This course is designed to help the student look and feel more attractive and to complement development in other meaningful areas. Areas of study include physical control and visual poise; personal grooming and makeup application (women only); wardrobe selection; communication skills; social and business etiquette; techniques for getting a job, handling a job efficiently and relating to employers and co-workers.

FIFTH QUARTER

ENG 204 Oral Communication	3	0	3

The principles, techniques and practical applications of communicating the thoughts and personality through the voice and visible action of the individual to one or more persons for the purpose of achieving a previously determined response. Areas covered vary according to class needs, but in general, include: basic concepts, nonverbal and verbal language, vocal usage, speech preparation (analyzing audience and occasion, determining purpose, selecting and narrowing subject, gathering and organizing material, wording and practicing aloud) and effective listening.

BUS 205 Typewriting V	2	3	3

This course is based on production and speed building. The student will improve typing techniques including stroke control, accuracy, forced speed building and will retain speed for long periods of time by typing straight copy. Emphasis is also on applying skills, working under pressure, decision-making and producing neat, attractive and mailable copy. All production work will be timed.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 207 Shorthand Dictation and Transcription II	3	2	4

The student will refine his/her shorthand skills and integrate these skills with various secretarial procedures. The student will improve his/her ability to take dictation at high speeds for longer periods of time and to transcribe mailable letters. The student will develop the accuracy, speed and vocabulary that will enable him/her to meet the stenographic requirements of business, industrial and professional offices.

BUS 210 Office Machines II	2	2	3

The student will be introduced to the machines currently being used in business and industry. Machines and units that could be utilized in the course are: (1) billing machines, (2) reprographics unit, (3) automatic and executive typewriters and (4) data processing equipment.

BUS 273 Word Processing	5	4	7

The student will be provided a thorough background of word processing concepts and skills for both administrative and correspondence positions.

SIXTH QUARTER

BUS 208 Shorthand Dictation and Transcription III	3	2	4

The student will continue to build speed and develop skill in taking dictation and transcribing material appropriate to an office. Emphasis will be on accuracy, skill and vocabulary.

BUS 211 Machine Dictation and Transcription I	2	2	3

The student will develop the skill of transcribing at the typewriter materials appropriate to the course of study-secretarial or clerical (general, legal or medical secretarial or office education).

BUS 271 Office Management	3	0	3

The student will study and apply the fundamental principles and practices of office management. Emphasis is on the role of office management, including functions, office automation, planning, controlling, organizing and making judgments and decisions based on the nature and size of the business and experience of the manager.

BUS 215 Secretarial Office Applications	1	10	6

The student will develop occupational competencies through experiences and practice in a simulated office or through on-the-job experience in a cooperative program and be given opportunities to apply knowledge acquired in previous secretarial or general office studies. The student will be supervised and coordinated by the instructor and/or employer. The student will participate in making necessary decisions relating to business and office operations, organizational division of responsibilities and implementation of decisions.

ELECTIVES

An appropriate list of electives for this curriculum is shown from which the institutions may select courses to complete the program of study. The institution has the prerogative to develop new courses for the electives or to modify courses from the suggested list to fulfill the local objectives. It is suggested, however, that technical courses be appropriate to the major area of study; that they not change or alter the major objectives of the program nor create a false impression of proficiency in an area either related or foreign to the major.

Elective courses must be selected from an associate degree course or new courses should be developed at a comparable level. The institution may elect to require certain courses or may let the student select an appropriate course.

BUSINESS

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 116 Business Law II	3	0	3

This course is designed for students who need an understanding of substantive business law. The student will be able to define business law terminology and state involvement of business law in the following areas: the legal considerations of partnerships, corporations, bankruptcy and real property.

BUS 121 Accounting II	3	2	4

A second course in the basic principles and concepts of accounting. Emphasis is on determining merchandise inventory, identifying inventory systems, adjusting for deferrals and accruals, accounting for property taxes and operating a payroll system.

BUS 123 Business Finance I	3	0	3

Financing of business units, as individuals, partnerships, corporations and trusts. A detailed study is made of short-term, long-term and consumer financing.

BUS 219 Credit Procedures and Problems	3	0	3

The student will be able to describe and discuss principles and practices in the extension of credit; classes of credit; credit instruments; consumer credit and current collection methods and procedures and federal, state and local credit regulations.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
S 229 Taxes I	3	2	4

is course is primarily designed to introduce and apply the methods and ans for preparing income tax returns. Emphasis is on fundamentals of x preparation, individual income tax returns, business, corporate and scellaneous tax returns and introduction to audit and appeals procedures.

S 233 Personnel Management	3	0	3

inciples of organization and management of personnel, procurement, placent, training, performance checking, supervision, renumeration, labor lations, fringe benefits and security.

S 235 Principles of Management	5	0	5

complete this course the student will know the major functions of nagement and the skills that lead to managerial success in business and dustry through study of planning, organizing, directing and controlling activities in an organization.

S 247 Business Insurance	3	0	3

investigation of fundamentals of risk and its application with particular phasis upon the exposures faced by the consumer and the insurance techques to cope with the exposures. Offered to the individual who will be a rchaser of insurance and as an introductory course to those who might want rther study in insurance preliminary to employment.

K 120 Marketing	5	0	5

e student will study problems of and be able to apply principles of rketing goods and services in a free enterprise economy. Emphasis is product selection and development, promotion, channels of distribution d pricing.

SOCIAL SCIENCE

C 201 Social Science	3	0	3

integrated course in the social sciences, drawing from the fields of thropology, psychology, history and sociology.

C 202 Social Science	3	0	3

further study of social sciences with emphasis on economics, political ience and social problems as they relate to the individual.

C 205 American Institutions	3	0	3

study of the effect of American social, economic and political institutions on the individual as a citizen and as a worker. The course dwells upon rrent local, national and global problems viewed in the light of our litical and economic heritage.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
PSY 206 Applied Psychology	3	0	3

A study of the principles of psychology that will be of assistance in the understanding of interpersonal relations on the job. Motivation, feelings and emotions are considered with particular reference to on-the-job problems. Other topics investigated are: employee selection, supervision, job satisfaction and industrial conflicts. Attention is also given to personal and group dynamics so that the student may learn to apply the principles of mental hygiene to adjustment problems as a worker and a member of the general community.

POL 201 United States Government 3 0 3

A study of government with emphasis on basic concepts, structure, powers, procedures and problems.

SOC 207 Rural Society 3 0 3

A study of selected elements of rural sociology with emphasis on current social changes. The course provides a sociological background for the understanding of rural social changes. Areas of study include rural culture, group relationships, social classes, rural and suburban communities, farm organizations, the communication of agricultural technology, rural social problems, agriculture adjustment and population change.

ECO 108 Consumer Economics 3 0 3

Designed to help individuals use resources of time, energy and money to get the most out of life. This course provides an opportunity to build useful skills in buying, managing finances, increasing resources and understanding better the economic system.

APPENDIX E-2

Curriculum Model - General Office

GENERAL OFFICE

(Curriculum Model)

Course Title		Hours Per Week		Quarter Hours Credit
		Lecture	Lab	
FIRST QUARTER (Fall)				
BUS 101	Introduction to Business	3	2	4
BUS 102	Typewriting I	2	3	3
BUS 109	Business Mathematics	5	0	5
BUS 110	Office Machine I	2	2	3
ENG 101	Grammar	3	0	3
		15	7	18
SECOND QUARTER (Winter)				
BUS 103	Typewriting II	2	3	3
BUS 115	Business Law I	3	0	3
BUS 183	Business Terminology and Vocabulary	2	2	3
ENG 102	Composition	3	0	3
SOC 215	Interpersonal Relationships and Communi cations or Social Science Elective	3	0	3
	Business Elective	2	2	3
		15	7	18
THIRD QUARTER (Spring)				
BUS 104	Typewriting III	2	3	3
BUS 112	Records Management	2	2	3
BUS 120	Accounting I	3	2	4
ECO 102	Economics I	3	0	3
ENG 206	Business Communication	3	0	3
	Business Elective	3	0	3
		16	7	19
FOURTH QUARTER (Summer)				
PSY 231	Personal Development	3	0	3
BUS 204	Typewriting IV	2	3	3
BUS 211	Machine Dictation and Transcription I	3	2	4
BUS 214	Office Procedures	3	2	4
EDP 104	Survey of Data Processing Systems (Introductory)	3	2	4
		14	9	18

		Hours Per Week		Quarter Hours
		Lecture	Lab	Credit
FIFTH QUARTER (Fall)				
BUS 205	Typewriting V	2	3	3
BUS 210	Office Machines II	2	2	3
BUS 212	Machine Dictation and Transcription II	2	2	3
BUS 273	Word Processing (Introductory)	3	0	3
ENG 204	Oral Communication or Social Science Elective	3	0	3
	Business Elective	3	0	3
		15	7	18
SIXTH QUARTER (Winter)				
BUS 215	General Office Application (Simulation)	1	10	6
or		or		
BUS 215	General Office Application (Cooperative)	1	9	4
BUS 271	Office Management	3	0	3
	Business Elective	3	0	3
TOTAL WITH SIMULATION		82	44	103
TOTAL WITH COOPERATIVE EDUCATION		82	43	101

COURSE DESCRIPTIONS BY QUARTERS

FIRST QUARTER	Hours Per Week Lecture	Lab	Quarter Hours Credit
BUS 101 Introduction to Business	3	2	4

A survey of the business world that introduces the student to the history of United States business, organization and administration, production, accounting, statistics, management, marketing, finance and business law.

BUS 102 Typewriting I	2	3	3

The student will be introduced to the touch typewriting system and will learn to use proper typing techniques, master the keyboard, type personal letters and postal cards and be able to tabulate. Upon completion of the course the student will be able to type 30 words per minute for three minutes.

BUS 109 Business Mathematics	5	0	5

This course was designed to provide a review of the fundamentals of arithmetic and their practical application to business problems in the processes of trading, operating, ownership, financing, investing, summarizing and analyzing. Topics covered include cash and trade discounts, markup, interest, taxes and pertinent uses of mathematics in business and industry.

BUS 110 Office Machines I	2	2	3

The student will be introduced to machines currently being used in business and industry. The student will receive training in the basic principles, operating procedures and business applications of machines such as the ten-key adding machine, the electronic caluclator (printing and display), the printing calculator and the full keyboard adding machine. Primary emphasis is on mastery of the touch system for all ten-key machines, with extensive coverage of electronic calculators.

ENG 101 Grammar	3	0	3

Designed to aid the student in the improvement of self-expression through writing. Emphasis is on grammar, diction, sentence structure, punctuation and spelling. It is intended to stimulate students in applying the basic principles of English grammar in their day-to-day situations in industry and social life.

SECOND QUARTER

BUS 103 Typewriting II	2	3	3

The student will develop speed and accuracy in typing with further mastery of correct typewriting techniques. These skills and techniques will be applied in tabulation, manuscript and correspondence. Upon completion of the course, the student will be able to type a minimum of 40 words per minute for five minutes.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 115 Business Law I	3	0	3

This course is designed for students who need an understanding of substantive business law. The student will be able to define business law terminology and state involvement of business law in the following areas: nature and source of our legal system, contracts, sales, commercial papers, bailments and agency.

BUS 183 Business Terminology and Vocabulary	2	2	3

The student will develop proficiency in spelling, definitions, word usage, terminology and use of the dictionary as used in business, technical and professional offices.

ENG 102 Composition	3	0	3

English Composition is designed to aid the student in improvement of self-expression by means of practical application in business and technical writing. Emphasis is on writing sentences, paragraphs and compositions.

SOC 215 Interpersonal Relationships and Communications	3	0	3

A basic course dealing with interpersonal and communication skills utilized in helping relationships. Examination is made of barriers which prohibit communication and hamper the helping process. The student will learn techniques of interviewing for specific purposes and acquire basic abilities in working with people.

THIRD QUARTER

BUS 104 Typewriting III	2	3	3

The student will develop skill in typing production problems with emphasis on the student's ability to function as an expert typist, producing mailable copies. Production unites will include tabulation, manuscript, correspondence and business forms. The student will also practice speed building and type a minimum of 50 words per minute for five minutes.

BUS 112 Records Management	2	2	3

The student will be able to apply the fundamentals of indexing and filing and realize the importance of filing as a basic tool of management. Theory and practice will be combined by the use of miniature letters, filing boxes and guides. Topics studied include alphabetic, numeric, geographic, subject and subject-decimal filing systems.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 120 Accounting I	3	2	4

The student will apply the basic functions, techniques, principles and concepts of accounting. Emphasis is on business transactions and their effect on the accounting equation; debits and credits in double-entry accounting; selecting and recording financial data in journals and ledgers; preparing work sheets; balance sheets and income statements and introduction to the basic concepts of internal control.

ECO 102 Economics I	3	0	3

This course is specifically designed to create an awareness of the economic decisions that are made daily by individuals and groups in society. Emphasis is primarily on general economics for citizenship; and generally on politics, history, sociology, etc. The course provides a foundation for further study in economics but is also designed for the student who may not have another economics course.

ENG 206 Business Communication	3	0	3

The course is designed to develop skill in writing business communication. Emphasis is placed on the types of business communication--response and reply letters, sales letters, credit letters, application letters, inter-office memorandums, minutes of meetings, etc.--used in business and industry.

FOURTH QUARTER

BUS 204 Typewriting IV (Advanced Typewriting)	2	3	3

The student learns the techniques needed in planning and in typing projects based on tasks performed by typists in business and industry. The student will be required to produce a reasonable amount of work within a given time period. Projects will include: letter forms, methods of duplication, statistical tabulation, typing of reports, manuscripts and legal documents, etc.

BUS 211 Machine Dictation and Transcription I	3	2	4

The student will develop the skill of transcribing at the typewriter materials appropriate to the course of study-secretarial or clerical (general, legal or medical secretarial or office education).

BUS 214 Office Procedures	3	2	4

Designed to acquaint the student with the responsibilities encountered by an office worker in today's office. Some responsibilities discussed include: receptionist duties, handling the mail, telephone techniques, travel information, office records, purchasing of supplies, office organization and job applications.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
EDP 104 Survey of Data Processing Systems	3	2	4

The student will develop a basic knowledge of the fundamental concepts and operational principles of data processing systems. Topics covered include: history of data processing, operating characteristics of computers, data processing terminology and the role of computers in business and industry. (This course is a prerequisite for all programming courses.)

PSY 231 Personal Development 3 0 3

This course is designed to help the student look and feel more attractive and to complement development in other meaningful areas. Areas of study include physical control and visual poise; personal grooming and makeup application (women only); wardrobe selection; communication skills; social and business etiquette; techniques for getting a job, handling a job efficiently and relating to employers and co-workers.

FIFTH QUARTER

BUS 205 Typewriting V 2 3 3

This course is based on production and speed building. The student will improve typing techniques including stroke control, accuracy, forced speed building and will retain speed for long periods of time by typing straight copy. Emphasis is also on applying skills, working under pressure, decision-making and producing neat, attactive and mailable copy. All production work will be timed.

BUS 210 Office Machines II 2 2 3

The student will be introduced to the machines currently being used in business and industry. Machines and units that could be utilized in the course are: (1) billing machines, (2) reprographics unit, (3) automatic and executive typewriters and (4) data processing equipment.

BUS 212 Machine Dictation and Transcription II 2 2 3

The student will develop the accuracy, speed and/or vocabulary to meet the machine transcription requirements of business and professional offices.

BUS 273 Word Processing 3 0 3

The student will be provided a thorough background of word processing concepts and skills for both administrative and correspondence positions.

ENG 204 Oral Communication 3 0 3

The principles, techniques and practical applications of communicating the thoughts and personality through the voice and visible action of the individual to one or more persons for the purpose of achieving a previously determined response. Areas covered vary according to class needs, but in general, include: basic concepts, nonverbal and verbal language, vocal usage, speech preparation (analyzing audience and occasion, determining purpose, selecting and narrowing subject, gathering and organizing material wording and practicing aloud) and effective listening.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit

SIXTH QUARTER

BUS 271 Office Management 3 0 3

The student will study and apply the fundamental principles and practices of office management. Emphasis is on the role of office management, including functions, office automation, planning, controlling, organizing and making judgments and decisions based on the nature and size of the business and experience of the manager.

BUS 215 General Office Application 1 10 6

The student will develop occupational competencies through experiences and practice in a simulated office or through on-the-job experience in a cooperative program and be given opportunities to apply knowledge acquired in previous secretarial or general office studies. The student will be supervised and coordinated by the instructor and/or employer. The student will participate in making necessary decisions relating to business and office operations, organizational division of responsibilities and implementation of decisions.

ELECTIVES

An appropriate list of electives for this curriculum is shown from which the institutions may select courses to complete the program of study. The institution has the prerogative to develop new courses for the electives or to modify courses from the suggested list to fulfill the local objectives. It is suggested, however, that technical courses be appropriate to the major area of study; that they not change or alter the major objectives of the program nor create a false impression of proficiency in an area either related or foreign to the major.

Elective courses must be selected from an associate degree course or new courses should be developed at a comparable level. The institution may elect to require certain courses or may let the student select an appropriate course.

BUSINESS

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 116 Business Law II	3	0	3

This course is designed for students who need an understanding of substantive business law. The student will be able to define business law terminology and state involvement of business law in the following areas: the legal considerations of partnerships, corporations, bankruptcy and real property.

BUS 121 Accounting II	3	2	4

A second course in the basic principles and concepts of accounting. Emphasis is on determining merchandise inventory, identifying inventory systems, adjusting for deferrals and accruals, accounting for property taxes and operating a payroll system.

BUS 123 Business Finance I	3	0	3

Financing of business units, as individuals, partnerships, corporations and trusts. A detailed study is made of short-term, long-term and consumer financing.

BUS 219 Credit Procedures and Problems	3	0	3

The student will be able to describe and discuss principles and practices in the extension of credit; classes of credit; credit instruments; consumer credit and current collection methods and procedures and federal, state and local credit regulations.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
BUS 229 Taxes I	3	2	4

This course is primarily designed to introduce and apply the methods and means for preparing income tax returns. Emphasis is on fundamentals of tax preparation, individual income tax returns, business, corporate and miscellaneous tax returns and introduction to audit and appeals procedures.

BUS 233 Personnel Management	3	0	3

Principles of organization and management of personnel, procurement, placement, training, performance checking, supervision, renumeration, labor relations, fringe benefits and security.

BUS 235 Principles of Management	5	0	5

To complete this course the student will know the major functions of management and the skills that lead to managerial success in business and industry through study of planning, organizing, directing and controlling of activities in an organization.

BUS 247 Business Insurance	3	0	3

An investigation of fundamentals of risk and its application with particular emphasis upon the exposures faced by the consumer and the insurance techniques to cope with the exposures. Offered to the individual who will be a purchaser of insurance and as an introductory course to those who might want further study in insurance preliminary to employment.

DMK 120 Marketing	5	0	5

The student will study problems of and be able to apply principles of marketing goods and services in a free enterprise economy. Emphasis is on product selection and development, promotion, channels of distribution and pricing.

SOCIAL SCIENCE

SSC 201 Social Science	3	0	3

An integrated course in the social sciences, drawing from the fields of anthropology, psychology, history and sociology.

SSC 202 Social Science	3	0	3

A further study of social sciences with emphasis on economics, political science and social problems as they relate to the individual.

SSC 205 American Institutions	3	0	3

A study of the effect of American social, economic and political institutions upon the individual as a citizen and as a worker. The course dwells upon current local, national and global problems viewed in the light of our political and economic heritage.

	Hours Per Week		Quarter Hours
	Lecture	Lab	Credit
PSY 206 Applied Psychology	3	0	3

A study of the principles of psychology that will be of assistance in the understanding of interpersonal relations on the job. Motivation, feelings and emotions are considered with particular reference to on-the-job problems. Other topics investigated are: employee selection, supervision, job satisfaction and industrial conflicts. Attention is also given to personal and group dynamics so that the student may learn to apply the principles of mental hygiene to adjustment problems as a worker and a member of the general community.

POL 201 United States Government	3	0	3

A study of government with emphasis on basic concepts, structure, powers, procedures and problems.

SOC 207 Rural Society	3	0	3

A study of selected elements of rural sociology with emphasis on current social changes. The course provides a sociological background for the understanding of rural social changes. Areas of study include rural culture, group relationships, social classes, rural and suburban communities, farm organizations, the communication of agricultural technology, rural social problems, agriculture adjustment and population change.

ECO 108 Consumer Economics	3	0	3

Designed to help individuals use resources of time, energy and money to get the most out of life. This course provides an opportunity to build useful skills in buying, managing finances, increasing resources and understanding better the economic system.

APPENDIX F

D. TASK STATEMENTS FROM MEDICAL AND BANKING OFFICE JOBS

The task statements related to medical office workers and to banking office workers were analyzed separately to assess in part the curriculum import that different Standard Industrial Classifications might have because of differences in job performance requirements.

The numbers of individual task sheets and resulting task statements used are contained in Table 32. The individual task sheets examined were not sufficient in number or scope to represent the range of tasks performed by office workers in medical or banking facilities.

TABLE 32

Task Sheets and Resulting Statements Extracted from Two Standard Industrial Classifications

SIC	Number of Task Sheets	Number of Goals
Service--Medical	186	24
Finance, Insurance, Real Estate--Banking	286	63

The separate analysis does provide clues to the peculiarity of requirement for successful performance in these two fields. In the area of medical care, successful performance seems to be judged by a pervading attitude of "tender, loving care" of patients and clients. In the area of banking, successful performance is even more stringently judged by "exactness" of checking and accuracy of handling numerical data. The remainder of this section is the special listing of "Service--Medical Task Statements" and "Finance, Insurance, Real Estate--Banking."

MEDICAL TASK STATEMENTS

03.00.05 The worker types medical letters, forms, articles, and reports. (38 task sheets)

02.03.02 The worker updates records and patient charts from lab reports, case histories, and other information. (28 task sheets)

05.00.05 The worker arranges schedules and patients/appointments. (18 task sheets)

01.05.04 The worker records payments for medical services. (16 task sheets)

05.00.06 The worker answers telephone inquiries. (16 task sheets)

01.01.06 The worker completes medical charges for insurance reimbursement. (15 task sheets)

01.03.05 The worker records payroll changes for hospital employees. (12 task sheets)

04.06.01 The worker performs procedures for hospital admission from lists of patients, or medical records. (10 task sheets)

02.01.10 The worker processes incoming hospital mail. (9 task sheets)

01.01.08 The worker prepares statements from patient's accounts and charge slips. (8 task sheets)

04.06.02 The worker arranges hospital discharges. (6 task sheets)

04.06.03 The worker processes patient funds. (4 task sheets)

05.00.08 The worker answers questions regarding patient billing. (3 task sheets)

01.01.11 The worker requests payment from delinquent patients. (2 task sheets)

04.06.04 The worker prepares insurance claims for welfare clients on medicare or medicaid. (2 task sheets)

01.01.12 The worker processes follow-up records of patient's visit. (1 task sheet)

04.06.05 The worker obtains extensions on ID cards. (1 task sheet)

04.06.06 The worker prepares birth certificates from delivery room records. (1 task sheet)

05.00.11 The worker arranges schedules for conference room. (1 task sheet)

05.00.12 The worker arranges doctor/patient conferences. (1 task sheet)

07.00.25 The worker requests student nurses' health examination appointments. (1 task sheet)

07.00.26 The worker updates personnel forms. (1 task sheet)

07.00.27 The worker administers an orientation program for new hospital employees. (1 task sheet)

10.00.04 The worker administers purchase and sale of stamps for hospital and patients. (1 task sheet)

BANKING TASK STATEMENTS

04.02.01 The worker processes over-the-counter requests and inquiries. (26 task sheets)

01.06.03 The worker prepares financial reports. (26 task sheets)

02.04.03 The worker duplicates items for permanent records. (24 task sheets)

01.04.02 The worker verifies totals of cancelled checks, computer tapes, and tellers' balance sheets. (21 task sheets)

03.00.09 The worker types information on forms, cards, or letterheads from dictation, applications, computer listings, and other source documents. (17 task sheets)

01.04.04 The worker performs routine check on such items as deposit slips, adding machine tapes, and advices. (15 task sheets)

03.00.10 The worker types reports/bulletins from rough drafts and lists. (14 task sheets)

01.06.04 The worker records receipts and withdrawals in the ledger. (13 task sheets)

01.04.05 The worker corrects checks, savings and withdrawal slips, balance sheets, and other source documents. (12 task sheets)

01.05.05 The worker records deposits to customer accounts. (12 task sheets)

01.09.01 The worker prepares disbursements from customer accounts. (12 task sheets)

02.01.09 The worker processes incoming mail such as bank forms and checks. (11 task sheets)

01.03.06 The worker punches payroll data. (8 task sheets)

01.04.06 The worker checks computations with proofing machine. (8 task sheets)

01.08.03 The worker processes credit information. (8 task sheets)

04.02.03 The worker processes new accounts, transfers of accounts, and trust accounts for customers. (8 task sheets)

02.02.05 The worker arranges ledger cards for filing or further processing. (6 task sheets)

04.02.04 The worker prepares all stop payments. (5 task sheets)

02.02.06 The worker updates the central index files. (4 task sheets)

04.02.06 The worker processes estate settlements for customers. (3 task sheets)

06.02.03 The worker codes payment cards, checks, and deposit/withdrawal slips for keypunching. (4 task sheets)

04.02.07 The worker prepares applications for vendor's single interest (VSI) insurance coverage. (2 task sheets)

01.04.07 The worker distributes daily cash to tellers in branch banks. (2 task sheets)

01.04.08 The worker sorts coins from the federal reserve bank daily. (2 task sheets)

04.02.08 The worker administers safety deposit boxes. (2 task sheets)

04.02.09 The worker checks claims for transfer, trade, or exchange of securities. (2 task sheets)

04.02.10 The worker compiles broker's daily exchange summary sheets. (2 task sheets)

04.02.11 The worker processes settlement of buy and sell orders. (2 task sheets)

06.02.04 The worker maintains control of input/output work flow between corporate trust department and data processing department. (2 task sheets)

06.02.05 The worker corrects computer rejected debits/credits. (2 task sheets)

04.02.12 The worker issues payment to utility companies for bills paid at bank. (1 task sheet)

01.04.09 The worker verifies installment loan balances. (1 task sheet)

01.04.10 The worker prepares night deposits. (1 task sheet)

01.04.11 The worker performs audit of particular functions in individual departments of the bank. (1 task sheet)

01.04.12 The worker codes transaction tax on tickets. (1 task sheet)

01.05.08 The worker performs bookkeeping duties of a small bank. (1 task sheet)

01.06.05 The worker records loan payment reversing entries. (1 task sheet)

02.01.20 The worker delivers batches of transactions to the vault area. (1 task sheet)

02.03.05 The worker corrects names on loan files, bank records, and insurance policies from deeds of death certificates. (1 task sheet)

04.02.13 The worker issues receipts for securities. (1 task sheet)

04.02.14 The worker checks numbers and amounts of securities. (1 task sheet)

04.02.15 The worker processes stock transactions to be delivered to another broker. (1 task sheet)

04.02.16 The worker processes trading in municipal bonds. (1 task sheet)

04.02.17 The worker processes outgoing cash letters in foreign currency. (1 task sheet)

04.02.18 The worker processes incoming cash letters from foreign correspondent banks. (1 task sheet)

04.02.19 The worker processes assumptions of loans on request for beneficiary statement indicating a prospective buyer. (1 task sheet)

04.02.20 The worker prepares currency for shipping orders. (1 task sheet)

04.02.21 The worker informs customers that payments made by bank to insurance company have been returned. (1 task sheet)

04.02.22 The worker types insurance cancellation letters. (1 task sheet)

04.02.23 The worker verifies insurance coverage and registration of the bank as legal owner of all auto installment loans. (1 task sheet)

04.02.24 The worker prepares customer payroll schedule. (1 task sheet)

04.02.25 The worker checks errors for large corporations. (1 task sheet)

04.02.26 The worker issues savings certificates. (1 task sheet)

04.02.27 The worker processes savings certificates to be redeemed. (1 task sheet)

04.02.28 The worker prepares travelers checks for customers. (1 task sheet)

04.02.29 The worker prepares Christmas Club coupons for customers. (1 task sheet)

04.02.30 The worker obtains permission to grant 30-day credit accounts to potential customers. (1 task sheet)

04.04.06 The worker processes requisitions for savings bonds. (1 task sheet)

04.04.07 The worker processes call bonds listed in a national publication. (1 task sheet)

04.04.08 The worker issues government bonds. (1 task sheet)

06.02.06 The worker prepares batches of checks for data processing. (1 task sheet)

06.02.07 The worker types cash letters for checks drawn on bank but cashed elsewhere. (1 task sheet)

TABLE 50. FIRST SEQUENCE OF NINE HIGH-PRIORITY ABILITIES PROPOSED FOR PREPARATION OF OFFICE PERSONNEL.

High-Priority Emerging Ability	Ability Common to This Level of Personnel			
	Management	Supervisory	Clerical	Prof.-Tech.
A1--Ability to comprehend and conceptualize the system of the organization or unit as a vast network or information flow and to understand as an employee one's position in the operation of the system.	x	x	x	x
B2--Ability to adjust quickly to new equipment, procedures, and work sequences brought about by rapid technological changes for the purpose of updating skills, increasing individual productive capacity, and raising company output.	x	x	x	x
B4--Ability to perform adequately in one system, switch to another system and perform adequately, and then switch back and perform adequately again. (Total job flexibility)	x	x	x	x
C3--Ability to recognize how inaccurate data entering a system may affect outcomes on succeeding jobs.	x	x	x	x
D1--Ability to gain rapport with all racial groups.	x	x	x	x
E2--Ability to communicate via data communication devices and to know the limitations, methods of utilization, and choose from available equipment for particular operations.	x	x	x	x
G2--Ability to input data in an on-line real-time system to obtain information for report preparation, office work production, and exception reporting.	x	x	x	x
G3--Ability to review information systems output to determine if there are errors.	x	x	x	x
G4--Ability to determine what happened to produce the results in an information system and to provide corrections of data, if needed.	x	x	x	x

TABLE 51. SECOND SEQUENCE OF TWENTY-ONE HIGH-PRIORITY ABILITIES PROPOSED FOR PREPARATION OF OFFICE PERSONNEL.

High-Priority Emerging Ability	Ability Common to This Level of Personnel			
	Manage-ment	Super-visory	Cleri-cal	Prof.-Tech.
G6--Ability to utilize contemporary record storage techniques including microfilm, microfiche, aperture cards, etc., including indexing and operating the system.		x	x	x
H1--Ability to operate various pieces of new equipment through self-instruction or in-service training. (MTST, Electronic Calculator, ATS, etc.)		x	x	x
H2--Ability to operate various computer data manipulation devices. (Input, Output, Storage, and Retrieval)		x	x	x
H3--Ability to operate microfilm and microfiche equipment.		x	x	x
I3--Ability to convert data to appropriate coding schemes.		x	x	x
I4--Ability to assemble and arrange input data for processing.		x	x	x
I1--Ability to write and execute information systems programs.		x		x
C1--Ability to analyze the needs, attitudes, motivations, and actions of others to facilitate the desired outcomes.	x	x		x
C2--Ability to interface between management and informational systems personnel.	x	x		x
E1--Ability to summarize output from information systems for the purpose of presenting management with concise reports.	x	x		x
E3--Ability to interpret and communicate the findings resulting from research studies.	x	x		x
F1--Ability to identify and select among a number of alternate combinations of equipment, procedures, and people for that combination which best accomplishes a certain established objective, purpose, or goal according to certain criteria.	x	x		x
F2--Ability to identify information needed by management for decision-making purposes.	x	x		x

TABLE 51 (continued)

High-Priority Emerging Ability	Ability Common to This Level of Personnel			
	Management	Supervisory	Clerical	Prof.-Tech.
F3--Ability to formulate plans for collection, processing, storage, and retrieval of information to meet the needs of the organization.	x	x		x
F4--Ability to contribute to or conduct a feasibility study.	x	x		x
F5--Ability to contribute to or conduct cost effectiveness studies.	x	x		x
F6--Ability to ascertain what information should be programmed into an integrated information system.	x	x		x
F7--Ability to formulate standards, to measure performance, and to implement control activities, comparing results with expectations and reporting exceptions.	x	x		x
G1--Ability to construct basic flowcharts for projects, systems, or subsystems for purposes of planning, analyzing, implementing, controlling, and budgeting.	x	x		x
H4--Ability to ascertain and analyze the capabilities and functions of copying machines, data reproduction equipment, and data display terminals.	x	x		x
I2--Ability to locate information systems services and to select those that are appropriate.	x	x		x

APPENDIX G

Program Development Division
Department of Community Colleges
Raleigh, North Carolina

Name of Business _____

Nature of Business _____

Number of Office Employees _____

Title of Person Completing This Form _____

I. From the following list, indicate (✓) machines you use in your work.

Equipment	Machines Used	Equipment	Machines Used
Typewriter	___	Bookkeeping Machine	___
Manual	___	Keypunch Machine	___
Electric	___	Spirit Duplicator	___
Typebar	___	Mimeograph	___
Non-Typebar	___	Copier	___
Automatic	___	Offset	___
Adding Machine	___	Transcribing Machine	___
Full-Key	___	Addressograph	___
Ten-Key	___	Other (Please Identify)	
Calculator	___	_____	___
Electric	___	_____	___
Rotary	___	_____	___

II. Course Work

A. Please list the business courses you have taken and the number of courses. (Columns I and II)

I Course Title	II Number of Courses	III Most Beneficial

B. Please list the general education courses you have taken and any related courses and the number of courses. (Columns I and II)

I Course Title	II Number of Courses	III Most Beneficial

C. Of the courses you have listed, indicate (✓) in Column III the courses you think have been most beneficial in your work.

III. From the list of concepts and performance skills listed below, please check the column that appropriately indicates usage in your job.

	Never	Occasionally	Frequently
Skills used in your organization			
filing	___	___	___
handling telephone communications	___	___	___
using typewriters			
manual	___	___	___
electric	___	___	___
typing			
correspondence	___	___	___
fill-ins on form letters	___	___	___
checks	___	___	___
reports	___	___	___
invoices	___	___	___
purchase orders	___	___	___
agendas of meetings	___	___	___
financial statements	___	___	___
minutes of meetings	___	___	___
stencils	___	___	___
legal documents	___	___	___
insurance policies and related documents	___	___	___
bills of lading	___	___	___
itinerary	___	___	___
telegrams	___	___	___
tables	___	___	___
using fluid "ditto" process			
typing masters	___	___	___
machine operation	___	___	___
performing receptionist duties	___	___	___
using adding machines			
ten-key	___	___	___
full-keyboard	___	___	___
making out bills for customers	___	___	___
performing cashier duties	___	___	___
calculating discounts	___	___	___
receiving and recording orders	___	___	___
composing letters	___	___	___
taking dictation			
from shorthand	___	___	___
at the typewriter	___	___	___
doing payroll work	___	___	___
using time tables and making reservations	___	___	___
using business reference books	___	___	___
using mimeograph process			
cutting stencils	___	___	___
machine operation	___	___	___
operating a switchboard	___	___	___
using transcribing machines	___	___	___
using calculators			
electronic calculators	___	___	___
key-driven calculators	___	___	___
printing calculators	___	___	___
rotary calculators	___	___	___

	Never	Occasionally	Frequently
using offset process			
typing offset masters	___	___	___
machine operation	___	___	___
operating keypunch	___	___	___
using copying machine	___	___	___
operating bookkeeping machine	___	___	___
reconciling bank statements	___	___	___
using magnetic card typewriter	___	___	___
opening and annotating mail	___	___	___
	___	___	___

IV. Listed below are the basic components of office work. From this list indicate the one(s) that you think occur most frequently in your work.

Basic Components	Components Used	Comment
Communicating with Others (Interpersonal Relations)		
Sorting, Filing, Retrieving		
Typewriting		
Checking, Computing, and Verifying		
Collecting and Distributing		
Operating Business Machines (Other than Typewriter and ADP Equipment)		
Operating Automatic Data Processing Equipment		
Taking Dictation		
Supervising, Planning, and Training		
Analyzing Procedures and Flow Charting		

V. What recommendations do you make for updating a secretarial or office education program.